procserve

**Procserve Commerce Hub
User Manual Release 4.7**

Printed: October 2012
Software Version: 4.7.0

Table of Contents

1

About this Guide

1   About this Guide

1.1   Introduction

The aim of this guide is to give you a comprehensive guide on how to use the Procserve Commerce Network system effectively.

Who is Procserve?

Procserve is a Commerce Network. It connects buyers and suppliers together via a fully hosted eCommerce infrastructure. Procserve particularly specialises in providing and managing eProcurement and eInvoicing solutions and services for customers.

What does Procserve offer?

- Procserve offers packaged Commerce Solutions to enable our customers of all sizes and technical capabilities to connect to the Commerce Network
- All of our solutions are provided as software-as-a-service, with no requirement for capital investment in IT infrastructure

What do our solutions consist of?

The Procserve solutions are a blend of world-class application Commerce Modules, all hosted and managed by Procserve, combined with professional service packages that ensure a swift implementation and maximum return on investment.

The Procserve Commerce Network

Procserve offers two types of services, **commerce solutions** and **commerce services**. Regardless of what back office infrastructure organisations have, Procserve implements only those trading solutions needed to complete their ability to conduct electronic transactions between buyer and supplier. Procserve also provides services in order to implement these commerce solutions and exploit their capability. The level of services provided are entirely flexible.

2

Procserve Commerce Network

2 Procserve Commerce Network

2.1 Procserve Commerce Hub Getting Started
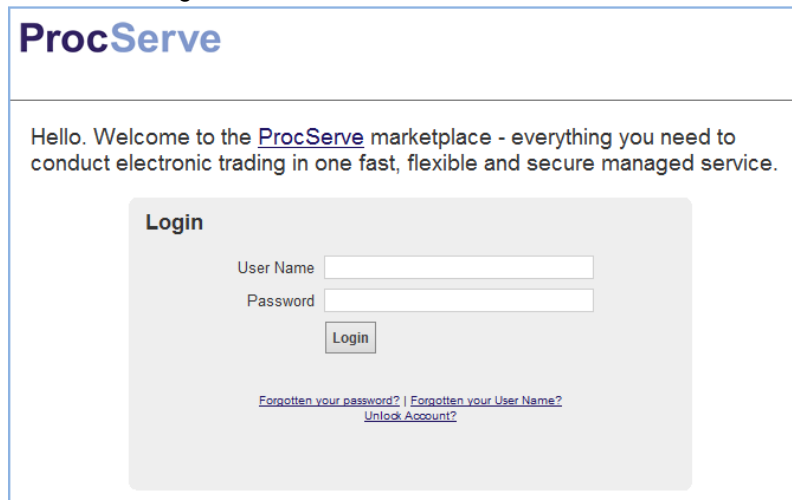
2.1.1 Logging on to Procserve Commerce Hub

1. Navigate to the Procserve Commerce Hub URL:

https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

Click the 'Log in' button

You will be presented with the log in screen:

2. Enter your username and password:

Tip! You will have received these via email. It is sometimes easier to copy and paste the system generated password.

Tip! If this is the first time you have logged in - you will be asked to reset your password and create a memorable word. The memorable word is used to reset your account should you lock it through multiple incorrect log in attempts:

ProcServe

Please change your password to something that is more meaningful to you. Please remember that your Community requires your password to adhere to the following rules; your password must include **letters**, **numbers** and **symbols** and must be at least **eight characters long**. Your password must also be different to the system generated password that you were sent.

Password reset

Current password
New password
Confirm new password

Reset and login

You will see the home page:

Hello Buyer_. You last logged in **today** (26 July) | My Profile | Feedback | Logout

ProcServe

Main Menu Administration

Home My Transactions Catalogue Shopping Raise a Free Text Order Create a new Request for Quote Supplier Directory

Home

Welcome

Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.

OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.

Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.

OTIS enables you to:

- Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using 'free-text' ordering
- Ensure that all requisitions are forwarded for approval by the appropriate budget holders
- Generate purchase orders and other procurement documents and transmit these electronically to suppliers
- Receive electronic invoices and other related procurement transactions from suppliers
- Manage and view all of these documents in a simple inbox/outbox based environment
- Control your spend using the document history and audit trails to provide easy visibility for you and your organisation.

Note: The menus that you are presented with will depend on the roles your user has been given.
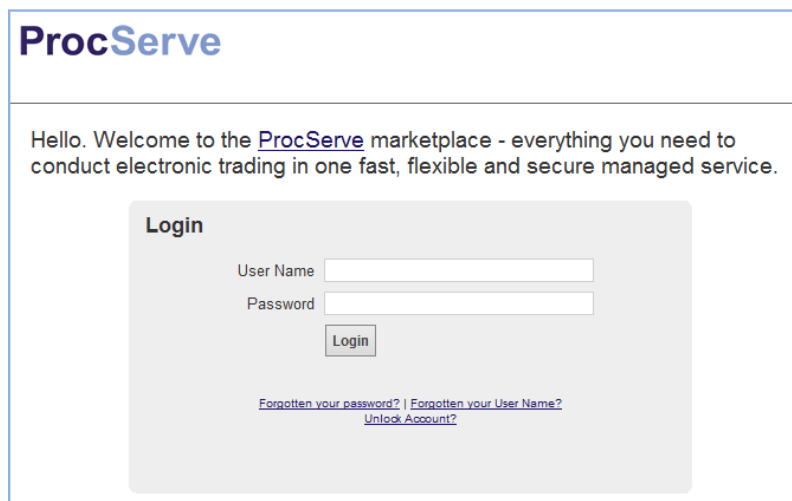
2.1.2 Retrieving a Lost Password

Overview

Should you forget your password, you can generate a system password which will be emailed to your registered account.
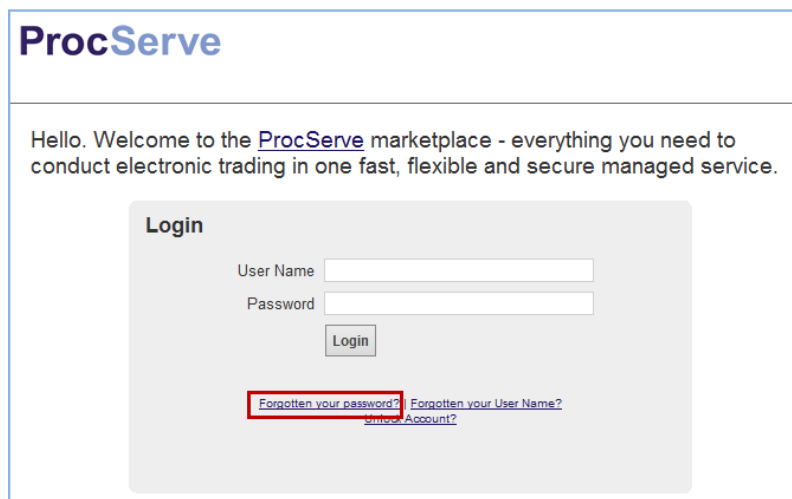
Retrieving a lost password

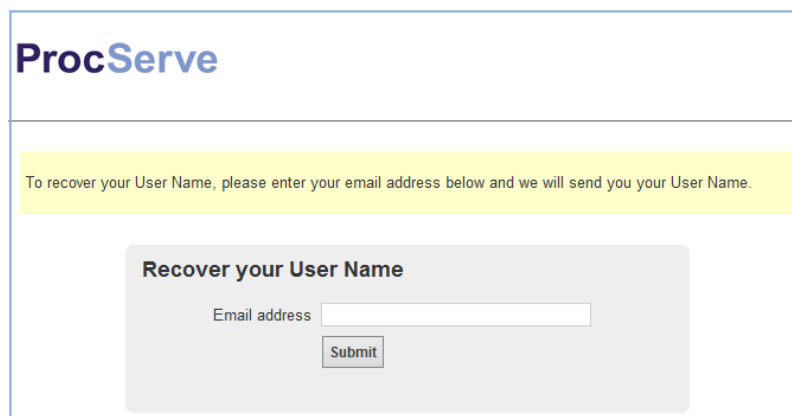**1. Navigate to the Procserve Commerce Hub URL:**

https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

You will be presented with the log in screen:

2. Click on the 'Forgotten your password?' link at the bottom of the page:

3. Enter your username:

4. Click 'Submit'

Note: Your password will be sent to you via email. The next time you log in you will have to change it from the system generated password.

2.1.3   Retrieving a Lost Username

Overview

Should you forget your username, you can request a reminder which will be emailed to your registered account.
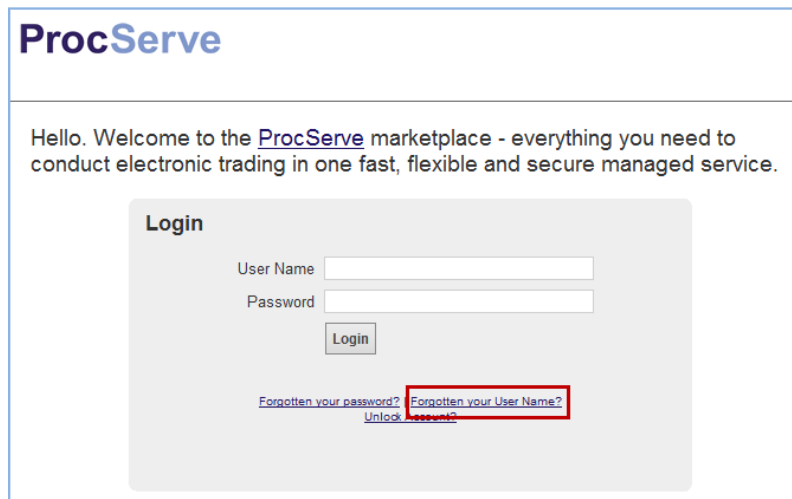
Retrieving a lost username
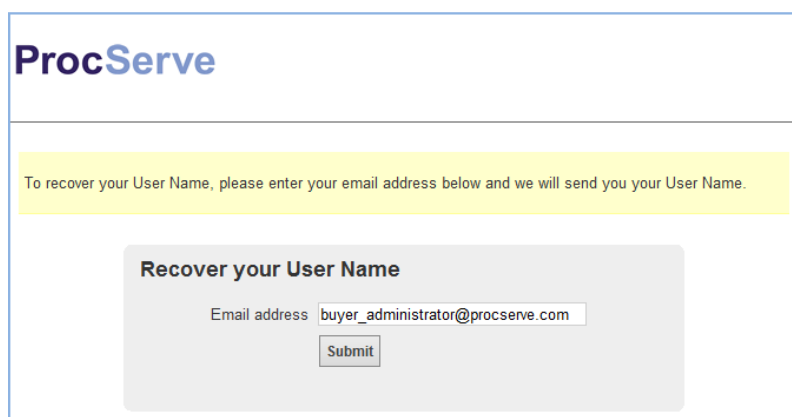
1. Navigate to the Procserve Commerce Hub URL:

> https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

You will be presented with the log in screen, at log in screen:

2. Click on the 'Forgotten your username?' link:

3. Enter your email address:

4. Click 'Submit'

Note: Your username will be sent to you via email as an example below:

Hello Buyer_

We received a request for your User Name to be resent to you. Please see below:

Your User Name is: buyer_administrator@strn011

Using this and your Password you can now log in to the eMarketplace at:

https://saturn-buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB

The first time you use this password you will be asked to change it to something more memorable for you.

It is recommended that instead of typing the User Name try copying and pasting it into the login screen using the following steps:
1. Highlight the User Name making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the User Name field of the login screen right click again and select 'Paste'

If you did not request a User Name reminder, please contact the Zanzibar Service Desk via zanzibarhelpdesk@procserve.com

2.1.4   Navigating Around Procserve Commerce Hub

Overview

When you first log in to Procserve Commerce Hub you will land on the homepage. Below is a brief description of where you need to navigate to in order to access the various features of Procserve Commerce Hub.

Note: The menu options and features that you have will depend on your organisation and the role that you have been given.
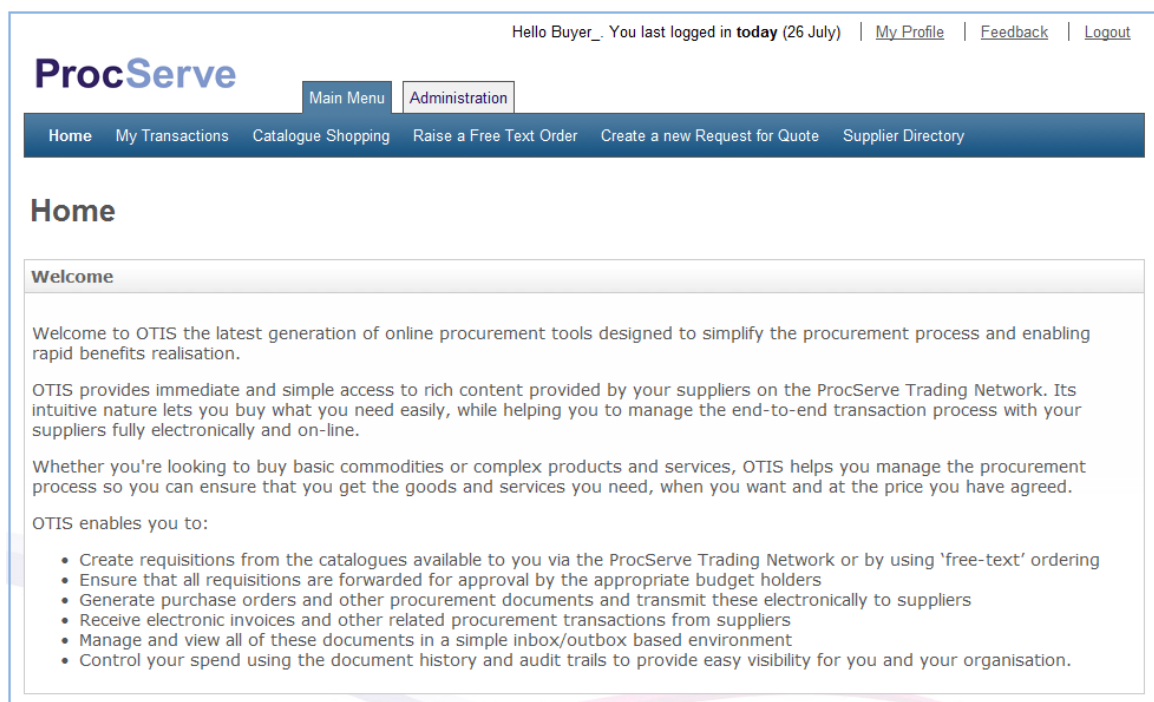
The Hompage

1] Header - from here you can change your profile and password, give feedback on Procserve Commerce Hub and log out of Procserve Commerce Hub.

2] Menu tabs - the two options are 'Main Menu' and 'Administration'. These are described later in this section.

3] Menu options - once selected you can view a variety of other menus which are described later in this section.

4] Menu body - the detail of the area where you can complete your required task.

5] Footer details - Procserve privacy and accessibility details as well as some useful contact information of the Procserve Commerce Hub administrators.

Main Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Home - shows the homepage and any news feeds

2] My Transactions - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

3] Catalogue Shopping - You can access the marketplace and shop for catalogue items.

4] Create a new Free Text Order - You can shop for non catalogue items. This tool provides a method to keep all transactions within Procserve Commerce Hub.

5] Create a new Request for Quote (RFQ) - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

6] Supplier Directory - Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.

Administration Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Community Management - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

2] Organisation Management - You can view and edit the the general address details of your organisation in 'Organisation Management'.

3] User Management - You can add, edit and deactivate users within your organisation in 'User Management'

4] Supplier Registration - You can manage your supplier adoption in 'Supplier Registration'

5] Catalogue Access Management - You can determine which organisations and users can see what content in 'Catalogue Access Management'

6] Catalogue Management - You can upload and manage your catalogue content in 'Catalogue Management'

2.1.5   My Profile

Overview

Within the My Profile you can edit your general details and view the roles that you have.

Note: Dependant on the roles you have been given you may not be able to see all functions in the below screenshots.

Viewing My Profile

1. Click on 'My Profile' from any page within Procserve Commerce Hub

You will be taken to the overview page where you can view and edit your basic details.

You can view any of the tabs and the details within them by clicking on the tab. By clicking on the 'Roles' tab you can view the roles that you have been given.

2.1.5.1 Editing My Profile

Overview

You can update your basic details on your profile.

Editing my profile

1. Click on 'My Profile' from any page within Procserve Commerce Hub
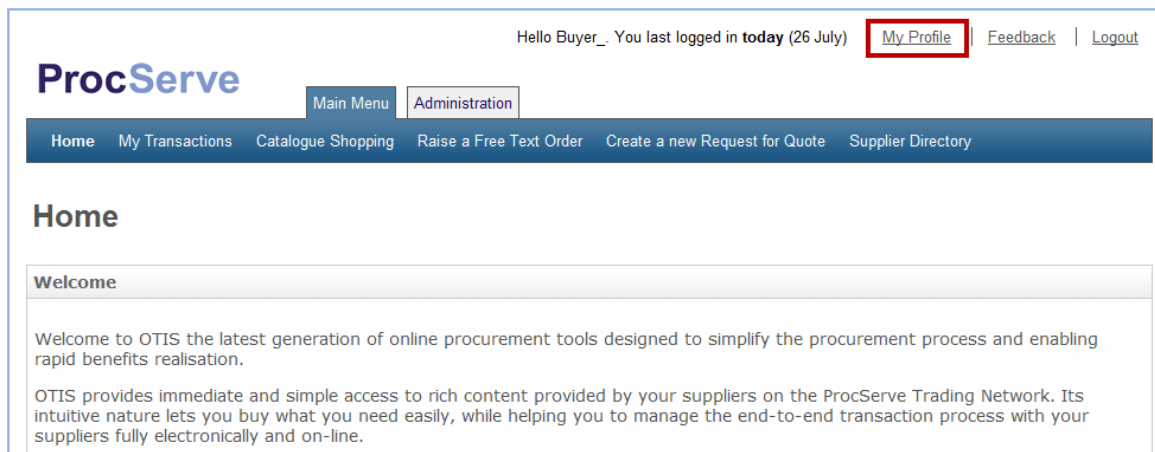
2. Click on 'Edit My Profile'

3. Edit the features you wish to change

4. Once complete, click 'Save Changes'

Note: If you wish to cancel your changes, click 'Cancel'

2.1.6   Unlocking your Account

Overview

Your account will be locked if you enter your log in details incorrectly 3 or more times. You will be informed that your account has been locked via an email. You can unlock your own account using your memorable word and the access code contained in the email.
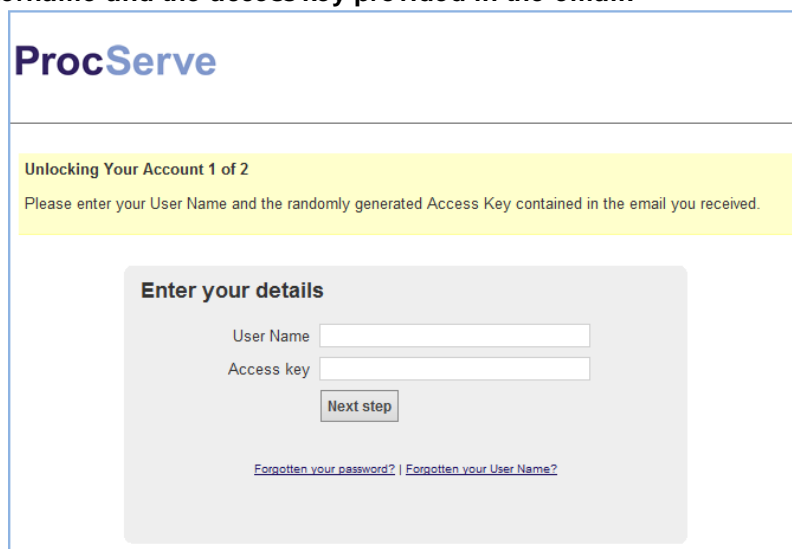
Unlocking your account

1. You will receive an email informing you your account has been locked. Within the email are the details you require to unlock your account:

> Hello Buyer_
>
> Your account has been locked due to too many invalid login attempts. To unlock your account you will need both a User Name and Access Key (included below) and you will need your Memorable Word, which you specified in your account profile.
>
> Your Access Key is: YDRM3DDN
>
> You can unlock your account at:
>
> https://saturn-buyers.procserveonline.com/otis/auth.html?marketplaceId=2&locale=en_GB
>
> It is recommended that instead of typing the Access Key, try copying and pasting it into the unlock screen using the following steps:
> 1. Highlight the Access Key making sure there are no spaces at the beginning or the end
> 2. Right click and select 'Copy'
> 3. In the Access Key field of the unlock screen right click again and select 'Paste'
>
> If you have any questions please contact the Zanzibar Service Desk via zanzibarhelpdesk@procserve.com
>
> Thank you.

2. Navigate to the url within the email or use the 'Unlock account?' on the login page:

3. Enter your username and the access key provided in the email:

> ## ProcServe
>
> **Unlocking Your Account 1 of 2**
>
> Please enter your User Name and the randomly generated Access Key contained in the email you received.
>
> **Enter your details**
>
> User Name [   ]
> Access key [   ]
>
> [Next step]
>
> Forgotten your password? | Forgotten your User Name?

4. Enter the memorable word. You hint will be displayed in the instructions window:

ProcServe

Unlocking Your Account 2 of 2

Please enter your memorable word which you specified in your account profile. Please note that the memorable word is case sensitive. You specified the following hint when creating your memorable word.

Dina

Unlock your account

Memorable word [●●●●●●●●]

[Unlock]

Forgotten your password? | Forgotten your User Name?

5. Your account is unlocked. If you do not remember your password you can request a new one which will be emailed to you.

procserve

2.1.7 Changing My Password

Overview

You can change your password at any time within 'My Profile'

Changing my password

1. Click on 'My Profile' from any page within Procserve Commerce Hub

2. On the overview screen, scroll down to the 'Change your password' area

3. Enter your old password and what you wish to change it to.

Note: Be aware of the password restrictions within your marketplace that are narrated above the password change fields

4. Click 'Save new password' to save the changes

Note: You can cancel the changes by clicking the 'Cancel' button.
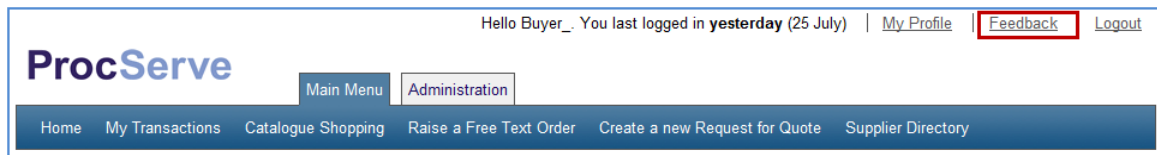
2.1.8   Giving Feedback on Procserve Commerce Hub

Overview

You can use the feedback section to provide Procserve with feedback on the system.
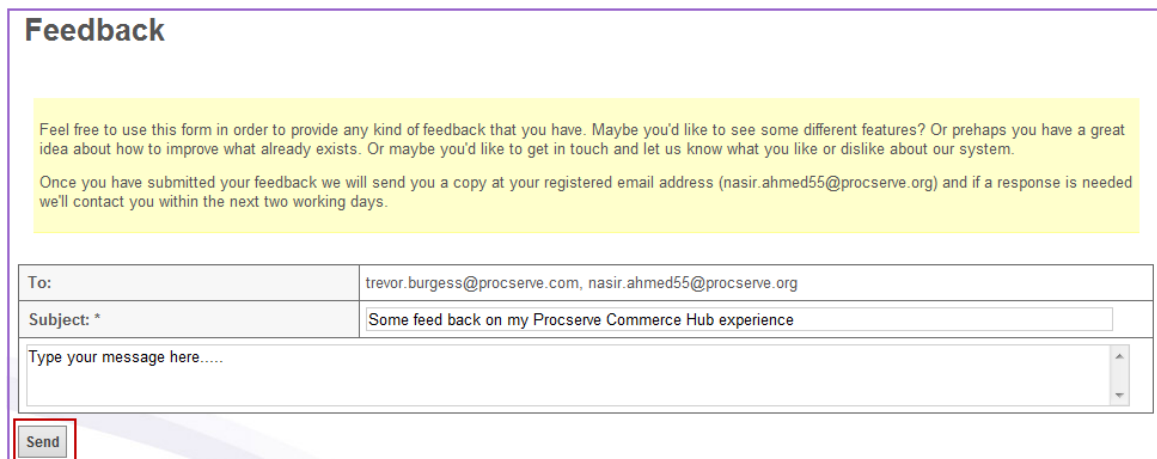
Providing feedback

1.From any screen within Procserve Commerce Hub click 'Feedback':
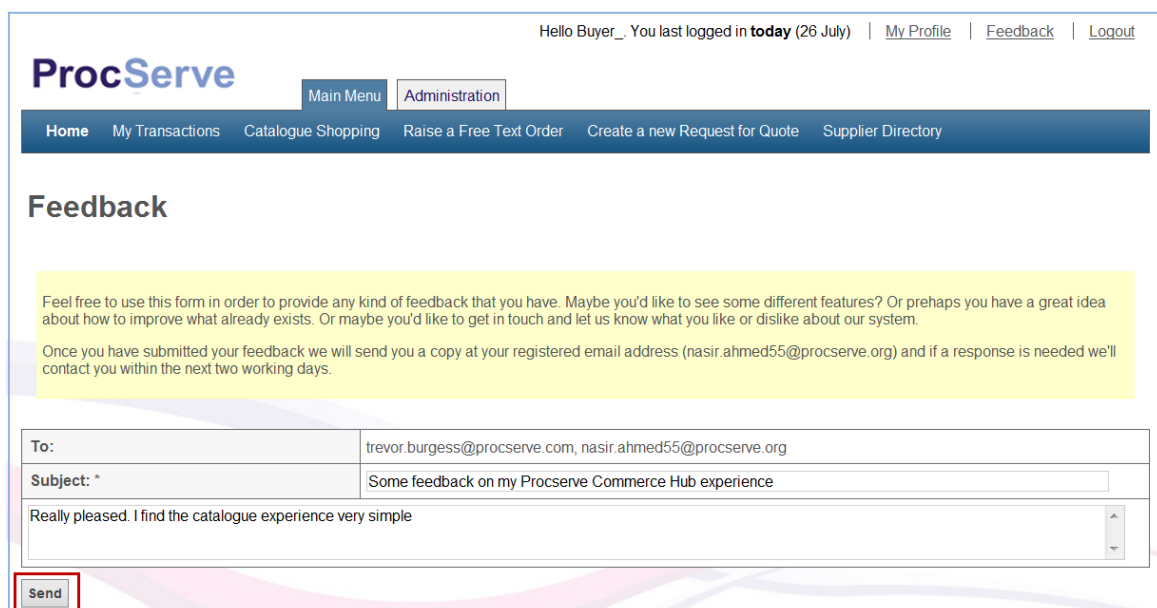
2. Enter your feedback notes and subject in the box provided:

3. Click 'Send'

Your message has now been sent to the system administrators.

2.2   Procserve Commerce Hub Main Menu

2.2.1   Overview

Main Menu Options

Note: Dependent on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Home - shows the homepage and any news feeds

2] My Transactions - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

3] Catalogue Shopping - You can access the marketplace and shop for catalogue items.

4] Create a new Free Text Order - You can shop for non catalogue items. This tool provides a method to keep all transactions within Procserve Commerce Hub.

5] Create a new Request for Quote (RFQ) - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

6] Supplier Directory - Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.

2.2.2   Shopping in Procserve Commerce Hub

2.2.2.1   Shopping Process Flow

Overview

This section describes how you can shop in Procserve Commerce Hub.
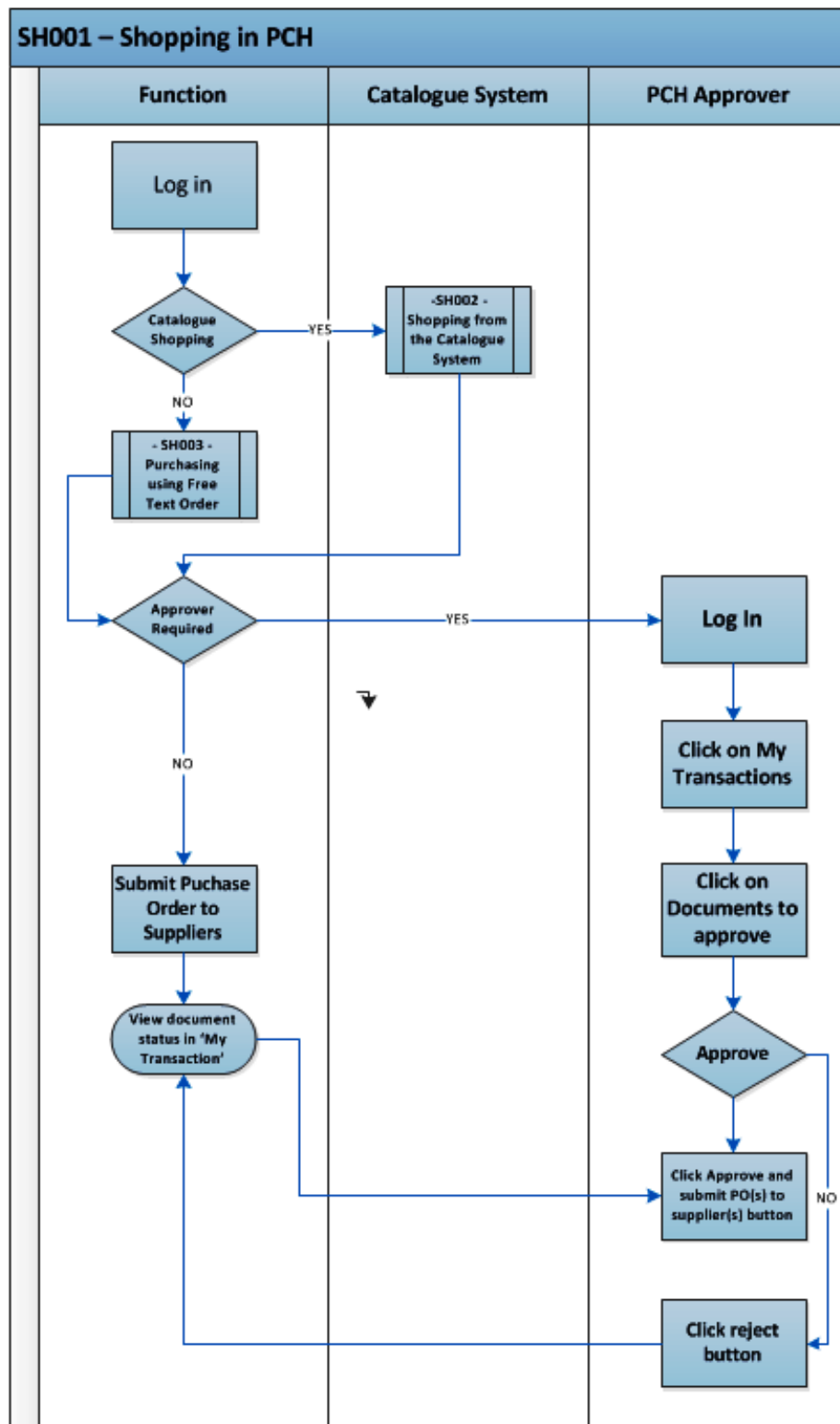
2.2.2.2   Shopping from the Catalogue System

2.2.2.2.1 Shopping from the Catalogue System Overview

Overview

This section describes how you can use the catalogue system to shop for goods and services.
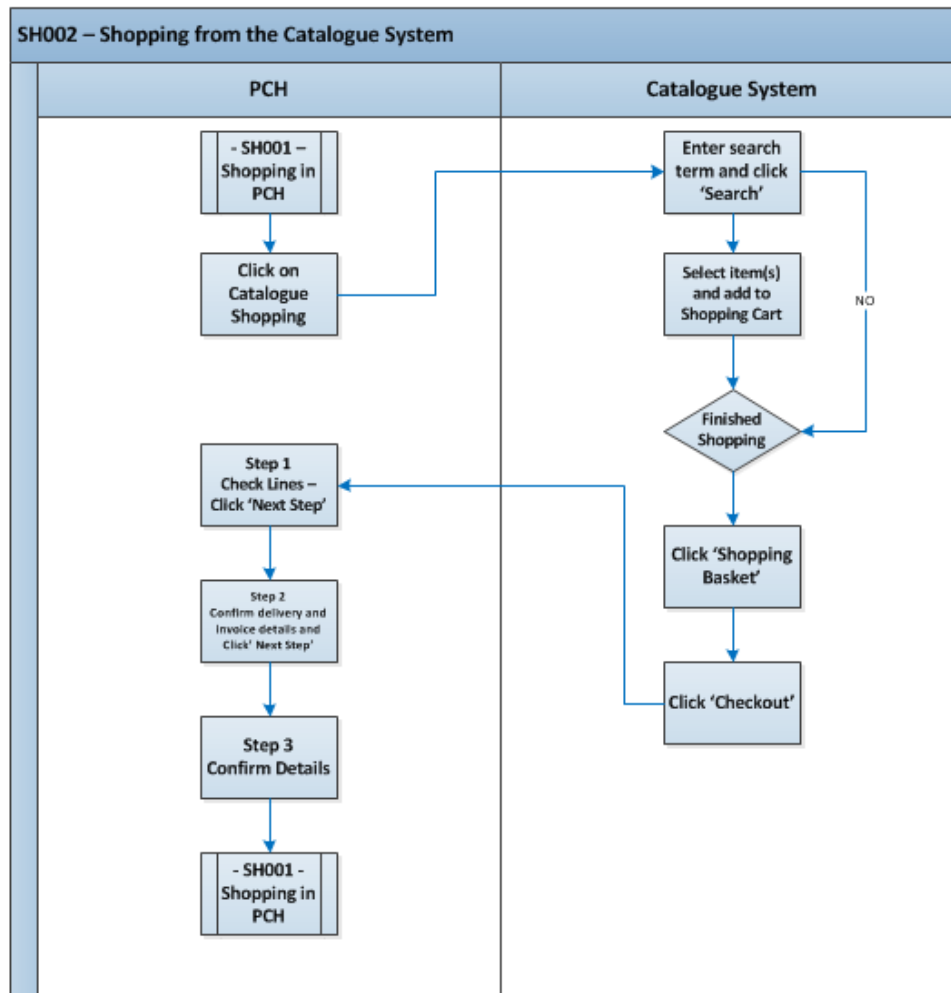
2.2.2.2.2 Simple Guide to Shopping

Overview

You can access the marketplace and complete catalogue shopping.

Note: If you can not see 'Catalogue Shopping' you may not have the required role. Please check with your system administrator.

Shopping using the catalogue system

1. Click on the 'Main Menu' tab within Procserve Commerce Hub
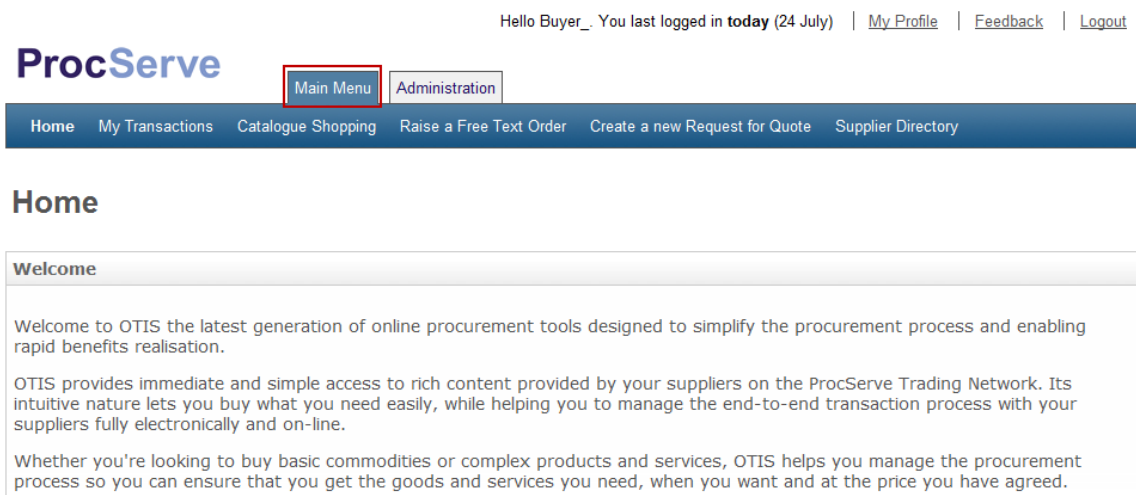
2. Click on 'Catalogue Shopping'
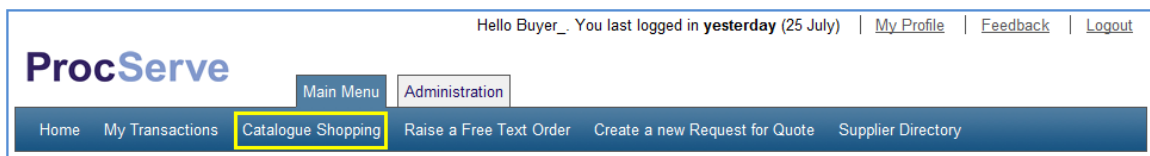
You will be redirected to the marketplace.

Note: There are multiple ways of searching and using the Procserve Catalogue System to find your items. This section shows a basic search to demonstrate the round trip experience in Procserve Commerce Hub.

Tip! You can exit from the marketplace shopping screen at any point by clicking 'Exit Catalogue Shopping'.
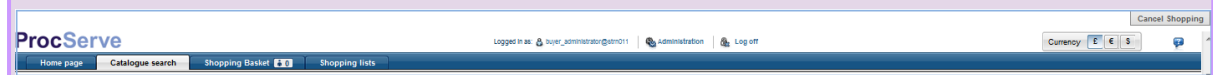
3. In the search bar enter your search term for the goods or services you are trying to procure and click 'Search'. For more information on this see the Catalogue Shopping section.

4. Select the item you require and add it to the shopping basket
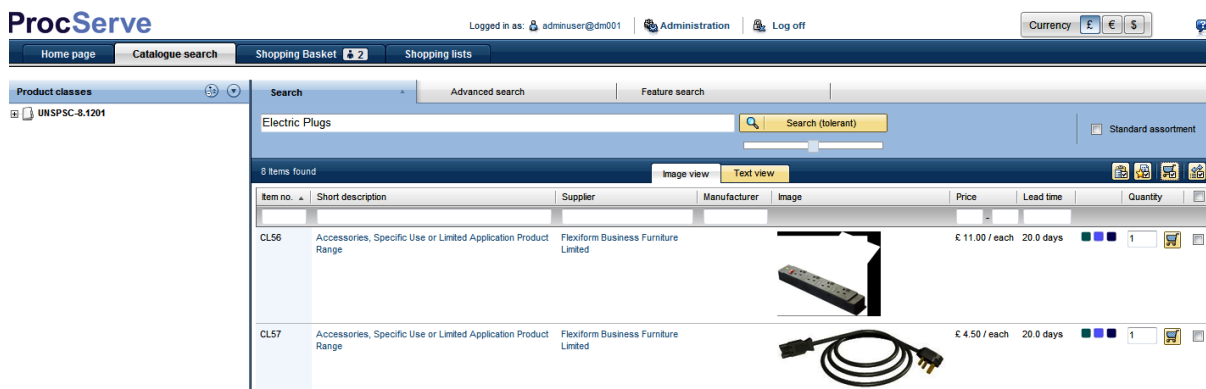
5. When you have finished shopping click 'Shopping Basket'

6. Click Checkout

You will redirected back to the Procserve Commerce Hub shopping section where you are required to complete further details

7. When you have added in all the items you require click 'Next Step'

You will next to fill in the Delivery and Invoicing details.

8. Select a target delivery date.

Note: When you click on the date a calendar drop down will appear where you can add the date.

9. You can enter a different delivery address or use the address that has defaulted from your profile

10. You can enter a different invoice information or use the address that has defaulted from your profile

11. When satisfied with your delivery and invoice details click 'Next Step'

12. From here you can enter any payment information

Create a new Free Text Order

Start	Free Text Order Templates	Draft Free Text Orders

Step 1 - Add line items

Step 2 - Add Free Text Order details

Step 3 - Choose supplier

Step 4 - Add payment details

Supplier Name	Payment Method
NAZ LTD	Invoice

Change the payment method for the selected suppliers to: [Invoice ▼] [Change]

[Next step]

Step 5 - Confirm details

Tip! A supplier can now select how they can receive payment. To enable different payment methods, the supplier needs to log in to the supplier portal; navigate to 'Edit Organisation'; and on the 'Overview' tab, edit their profile. Further down the page the supplier will have the option to change the payments that can be accepted.

A supplier can use Invoice, Credit / Debit Card and Lodge Cards.

To amend payment details for a supplier in the requisition - tick the box next to the supplier you wish to amend, select the entry from the drop down list and click 'Change':

Step 3 - Add payment details

	Supplier Name	Payment Method
☑	Flexiform Business Furniture Ltd	Invoice

Change the payment method for the selected suppliers to: [Invoice ▼] [Change]

Invoice
Credit / Debit Card
Lodged Card
ProcServe ePayment

[Next step]

Step 4 - Confirm details and send requisition

You will then be able to enter in the details of the payment card. For example:

Credit / Debit Card:

Supplier Name	Payment Method
Herman Miller Ltd	Invoice

Payment Card Details

Your card number *	[_____]
Card expiry date *	Month: [-- ▼] Year: [---- ▼]

[Save] [Cancel]

Lodged Card:

Payment Card Details

Supplier Name	Lodged Card Number
Herman Miller Ltd	

Save   Cancel

Once complete click **'Save'**.

Procserve ePayment method:

From dropdown list select ' Procserve ePayment' and click on **'Change',** then click on **'Next step'**

Step 3 - Add payment details

	Supplier Name	Payment Method
☑	Flexiform Business Furniture Ltd	Invoice

Change the payment method for the selected suppliers to: ProcServe ePayment ▾ Change

Next step

Step 4 - Confirm details and send requisition

Step 3 - Add payment details

Supplier Name	Payment Method
Flexiform Business Furniture Ltd	Invoice

Payment Card Details

Card alias *	Enter card alias name

Save   Cancel

Step 4 - Confirm details and send requisition

Enter the credit card alias name and then click on **'Save'**

Step 3 - Add payment details

	Supplier Name	Payment Method
☑	Flexiform Business Furniture Ltd	ProcServe ePayment

Change the payment method for the selected suppliers to: ProcServe ePayment ▾ Change

Next step

Step 4 - Confirm details and send requisition

At Step 3, click on **'Next step'**

procserve

13. When complete click 'Save' or 'Next Step'

You will be taken to a confirmation screen. From here you can review the details order. For example:

Tip! Should you wish to edit any details you can click the 'Edit before submitting' button at the footer of the page

Note: Dependant on your organisations set up you may require approval before the order is sent to the supplier.

Tip! If you have used a Credit / Debit Card or a Lodged Card, the payment details will appear on the summary page.

Organisations Requiring Approval

14. In the Submit for approval box select an approver for the list of names available

13. Once you have selected an approver, click 'Submit for approval'

Note: When a document is submitted for approval, the recipient will be informed via email that there is a document awaiting there action.

You will be redirected to 'My Transactions' where you will see your Requisition/Order with a status update message.

The approver you forwarded the requisition to will now be able to log in and approve or reject your requisition. The requester will receive an email when the requisition has been approved.

Tip! For more information on the catalogue system view the remainder of this section.

2.2.2.3 Purchasing using Free Text Orders

2.2.2.3.1 Purchasing using FTOs Overview

Overview

This section describes how you can create Free Text Orders using Procserve Commerce Hub.
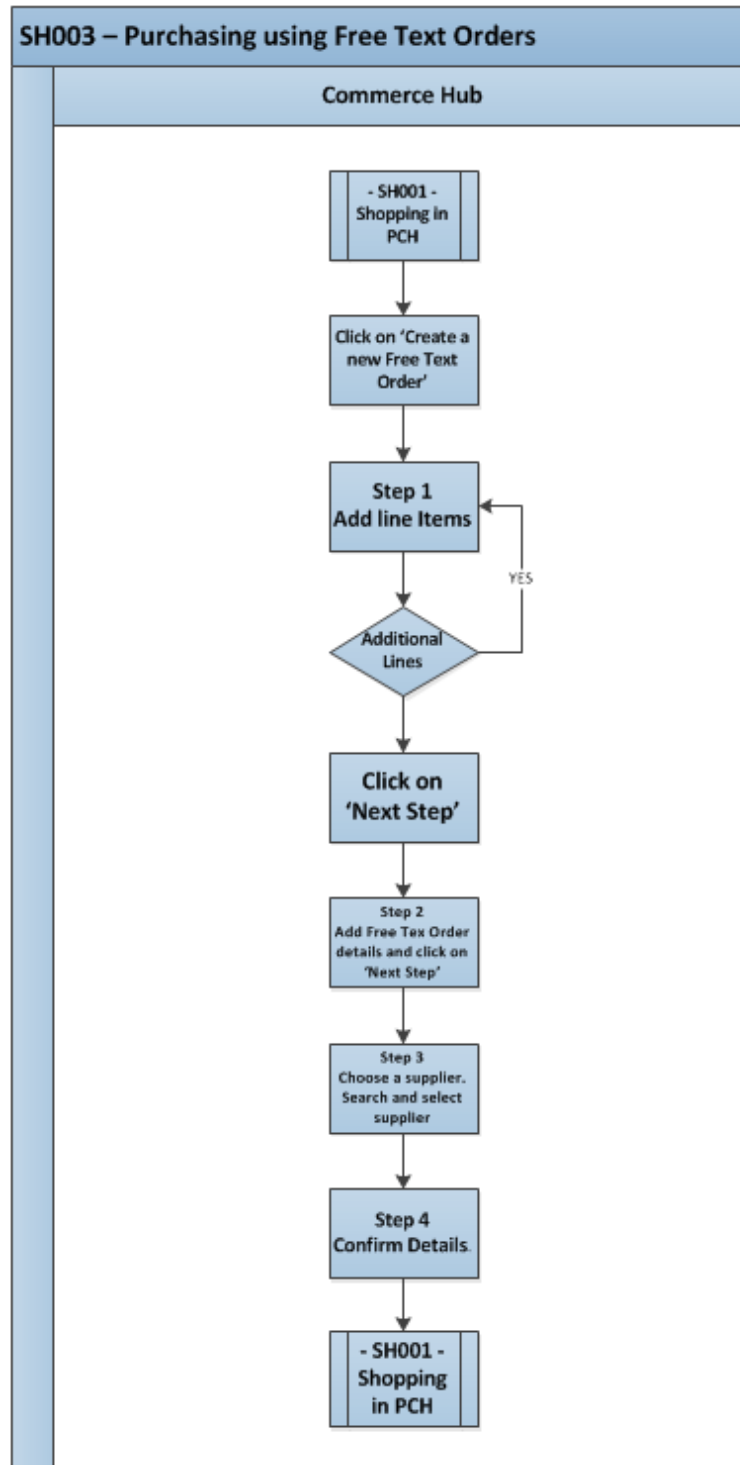
2.2.2.3.2 Creating Free Text Orders

Overview

You can request items that may not be in the catalogue system. This tool provides a method to keep all transactions within Procserve Commerce Hub.

Note: If you can not see 'Free text orders' you may not have the required role. Please check with your system administrator.

Creating a Free text order

1. Click on the 'Main Menu' tab within Procserve Commerce Hub

2. Click on 'Create a new Free Text Order'
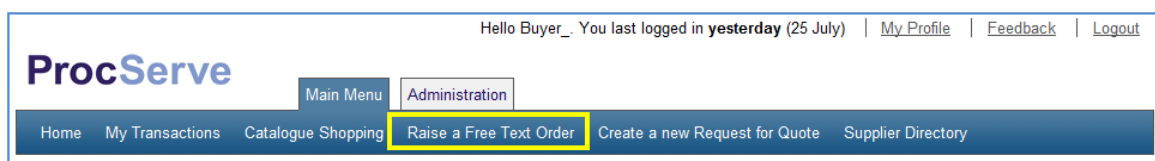
3. Add the item details in step 1 and click 'Add'

4. When you have added in all the items you require click 'Next Step'

Tip! You can edit or remove an item from your free text order by clicking the 'Edit' or 'Remove' button

5. Select a target delivery date.

Note: When you click on the date a calendar drop down will appear where you can add the date.

6. You can enter a different delivery address or use the address that has defaulted from your profile

7. You can enter a different invoice information or use the address that has defaulted from your profile

8. When satisfied with your delivery and invoice details click 'Next Step'

This will take you to the supplier selection screen.

Create a new Free Text Order

| Start | Free Text Order Templates | Draft Free Text Orders |

Step 1 - Add line items

Step 2 - Add Free Text Order details

Step 3 - Choose supplier

Find available suppliers

Search [All Categories ▾] for [＿＿＿＿] [Go]

Search for suppliers above.

Step 4 - Add payment details

Step 5 - Confirm details

9. You can either free text search for a supplier or use the category drop down to filter the available suppliers in your marketplace

Step 3 - Choose supplier

Find available suppliers

Search [All Categories ▾] for [Naz] [Go]

3 suppliers found

NAZ LTD
Categories:**Travel**
LONDON, E17 4SD
[Use this supplier]

NAZ STORES LTD
Categories:**Defence**
LONDON, E14 6AH
[Use this supplier]

10. When you have found the desired supplier you can select it by clicking 'Use this supplier'

11. On the following screen you will be prompted to enter any payment information

Create a new Free Text Order

| Start | Free Text Order Templates | Draft Free Text Orders |

Step 1 - Add line items

Step 2 - Add Free Text Order details

Step 3 - Choose supplier

Step 4 - Add payment details

Supplier Name	Payment Method
NAZ LTD	Invoice

Change the payment method for the selected suppliers to: Invoice ▾ [Change]

[Next step]

Step 5 - Confirm details

Tip! A supplier can now select how they can receive payment. To enable different payment methods, the supplier needs to log in to the supplier portal; navigate to 'Edit Organisation'; and on the 'Overview' tab, edit their profile. Further down the page the supplier will have the option to change the payments that can be accepted.

Financial information

Tax code	**VAT_Standard** ▾
Tax Number	GB60812378
Payments accepted	☐ BACS transfer ☐ Cash ☐ Cheque ☑ Credit Card ☑ Debit Card ☐ Direct Debit ☑ Lodged Card ☑ ProcServe ePayment
Merchant capacity	0 ▾
Currencies accepted	☑ £ Pounds sterling ☐ $ US dollar ☐ € Euro

A supplier can use Invoice, Credit / Debit Card and Lodge Cards and Procserve ePayment.

To amend payment details for a supplier in the requisition - tick the box next to the supplier you wish to amend, select the entry from the drop down list and click 'Change':

You will then be able to enter in the details of the payment or lodged card

For payment by Procserve ePayment system, you need to have an credit card alias name. Enter the alias name as below:

Once complete click 'Save'.

12. When complete click 'Save' or 'Next Step'

You will be taken to a confirmation screen. From here you can review the details of the Free Text Order.

Create a new Free Text Order

| Start | Free Text Order Templates | Draft Free Text Orders |

Step 1 - Add line items

Step 2 - Add Free Text Order details

Step 3 - Choose supplier

Step 4 - Add payment details

Step 5 - Confirm details

Please read over this order and check that the details are correct before submitting it.

Creation date	26 Jul 2012 16:59 BST
Deliver To	Buyer_ Administrator Hoe Street Walthamstow London E17 4SD GB
Target delivery date	31/07/2012

Invoice To	Buyer_ Administrator Hoe Street Walthamstow London E17 4SD GB
Telephone number	020861237461
Tax number	GB891208789

Item Name	Item Description	Quantity	Target Price (per unit)	Total price
Pens	Black ink ball point pens	200.0 Each	£0.80	£160.00
			Total	£160.00

This purchase order will be sent to

NAZ LTD
Categories: Travel
LONDON, E17 4SD
Telephone number: +442073331623
Email: nasir.ahmed@procserve.com
Payment: Invoice

Special Instructions

Document history
- This order has yet to be submitted

Submit for approval

Submit for approval by *	Admin _Nas ▾
Notes	

[Submit for approval] [Save as Template] [Save as Draft] [Edit before submitting] [Cancel]
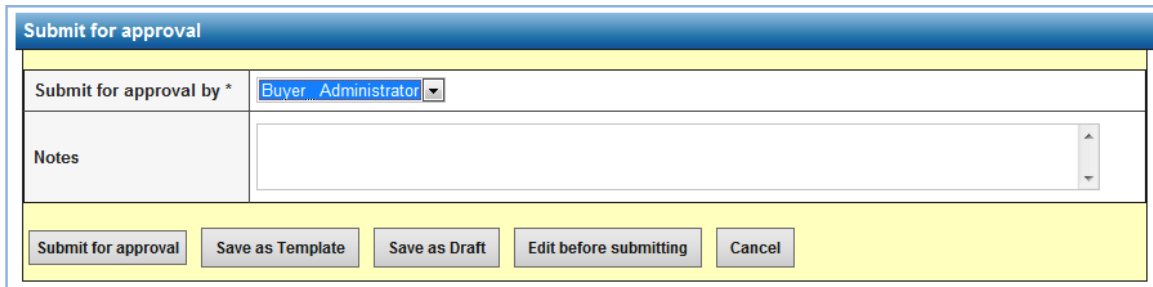
Tip! Should you wish to edit any details you can click the 'Edit before submitting' button at the footer of the page

Tip! If you have used a Credit / Debit Card or a Lodged Card, the payment details will appear on the summary page.

Dependant on your organisations set up you may require approval before the order is sent to the
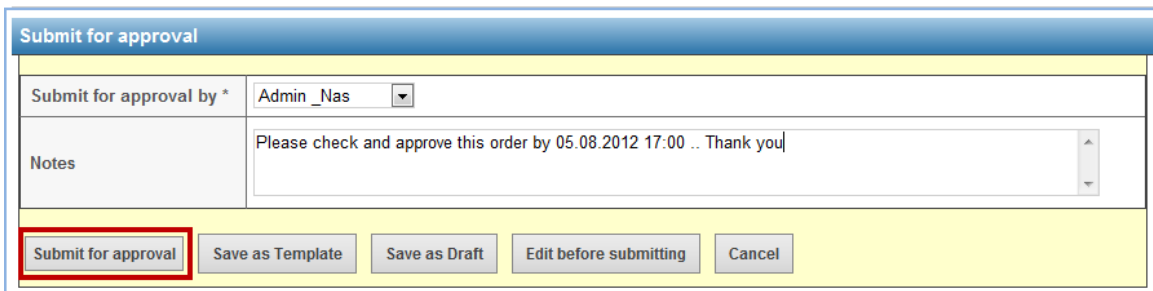
supplier.

13. In the Submit for approval box select an approver for the list of names available

14. Once you have selected an approver, click 'Submit for approval'

Note: The approver will receive an email informing them of a requisition pending their action.

You will be redirected to 'My Transactions' where you will see your Requisition/Order with a status update message.

The approver you forwarded the requisition to will now be able to log in and approve or reject your requisition. Once approved, the requester will receive email confirmation that it has been approved.

2.2.3   Creating a Request for Quote

2.2.3.1   Introduction to RFQ

Overview

You can use OTIS to send Request For Quotes (RFQ's) to suppliers that are members of your trading community or marketplace. In addition, OTIS allows all responding Quotes from these suppliers to be linked to the originating RFQ for audit trail purposes.

Responding Quotes that are selected as wining bids are automatically converted to Purchase Orders so no re-keying of data is required.

Note: You may not be able to complete an RFQ if you do not have the required roles.

Note: You should always consider your organisations procurement rules before undertaking an RFQ.

2.2.3.2   Raising a Request for Quote

Overview

This section shows how you can create a Request for Quote.
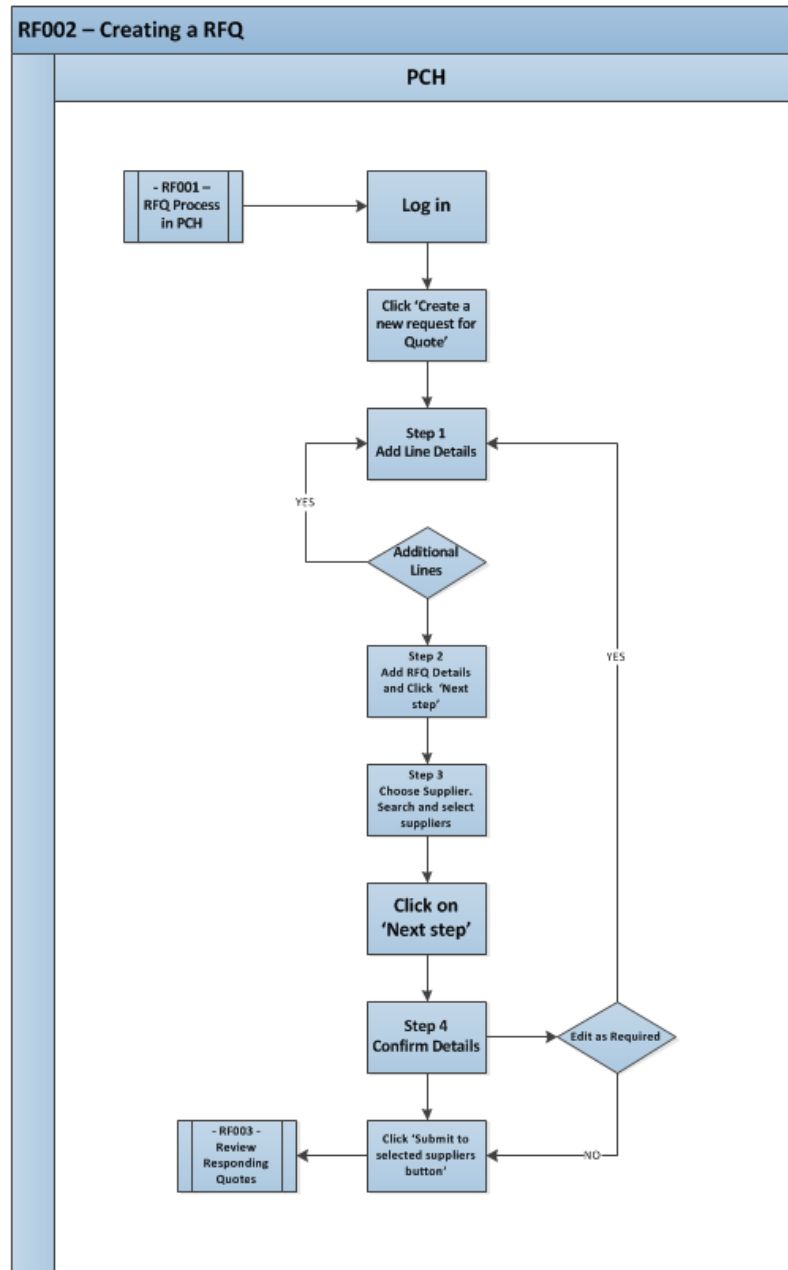
Creating an RFQ

1. Log in to Procserve Commerce Hub.

2. Click 'Create a new Request for Quote'
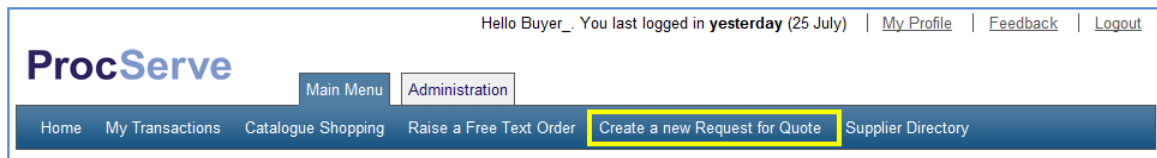
3. Add in the item details for the first line of your RFQ

Tip! Depending on what you are buying it can be good practice to put in a target price. For example, if you are buying some playground equipment - by putting in a target price you are informing the supplier about your budget and therefore to what scale there offer should be.

4. Click 'Add'

Note: You can add in multiple lines to complete your RFQ.

5. When complete click 'Next Step'

6. Add the details of the RFQ such as the expiry and delivery requirements

Note: Select a date from when this should expire field to define when the RFQ expires. This date will be shown within the RFQ sent to the supplier.

Tip! Adding a reminder in an RFQ sends you a reminder via email that the RFQ is coming to an end. You can define how many days before the RFQ closes you would like to receive this email from the drop down.

7. When satisfied with the terms of the RFQ, click 'Next Step'

8. You then need to search and select some suppliers to submit the RFQ too. You can select search for a supplier using the 'Find available suppliers' search engine:

9. Or you can use the category search to identify suppliers who provide the commodity you are interested in from the regions you require:

10.From within here you can search for categories and locations or drill through the hierarchy until you reach the desired commodity / location:

11. Once you have found suppliers that meet the your requirements click 'Add all'

You should be then presented with the suppliers that you have selected in your chosen suppliers list:

Tip! You can remove a supplier from the targeted suppliers list by clicking 'Remove this supplier'

12. Click 'Next step' at the bottom of the page once you have all the suppliers you require to

target with your RFQ.

13. You can then confirm the details of the RFQ, edit the content as required, and submit to the suppliers selected.

2.2.3.2.1 RFQ Templates

Overview

This sections shows how you can save your RFQ as template.

1. Create a new RFQ and go through all the step.

2 At Step 5, before you submit your RFQ to suppliers, click on 'Save as Template'

3. Scroll down to the bottom of the page and enter a suitable name for the RFQ template.

4. Enter a suitable name and click on 'Save' button to save your RFQ template.

If you need to use the template, click on 'Use' button, the RFQ process will restart from the beginning, where you can edit RFQ details, change add or remove suppliers and change delivery date.

In the list of saved templates, three buttons are displayed:

Use - This button allows to reuse the saved template and complete the process of submitting RFQ.

Edit - This buttons allows you to edit the template where you can add more lines and add or remove suppliers
.
Note: In the edit mode you will not be able to change the delivery and invoice address and you will not be able to set the delivery date.

Delete - This allows you to delete the template from the list.

2.2.3.2.2 RFQ Saving as a Draft

Overview

This function will automatically save your RFQ as draft as you complete one step and move to the next. Purpose of this function is if a user has to stop the creating of RFQ at any point, the saved draft allows the user to continue from where it stopped instead of starting from the beginning again.

1. Start RFQ process by selecting 'Create a new Request for Quote'
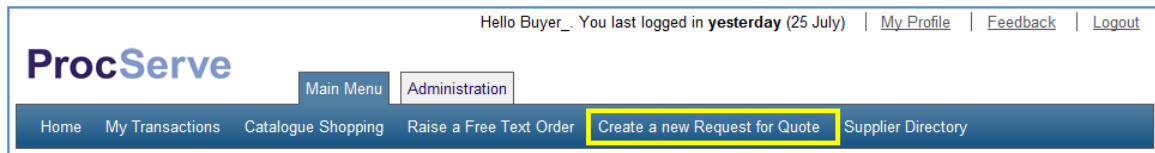
2. Complete at least one step of RFQ by clicking on the 'Next Step' and then select 'Draft Request for Quotations tab.

You will be presented with list of Draft RFQs as below.

Note: Draft will be saved at the point where you select the 'Next Step', as you can see from the above example, no supplier(s) name is populated, this is because the draft automatically saved where you stopped, in this instant, the process has not reached at step where the suppliers are selected.

You can save the RFQ as a draft and give name at any step.

3. Click on 'Save as Draft' button, then scroll down to bottom of the page and enter a suitable name and click on 'Save' button.

This RFQ will be sent to the following suppliers

ProMatrix
Categories: **Office Solutions**
London, SW1W 9SR
Telephone number: +442073336161
Email: nasir.ahmed21@procserve.org
Payment: **Invoice**

NAZ LTD
Categories: **Office Solutions**
LONDON, E17 4SD
Telephone number: +442073331623
Email: nasir.ahmed5@procserve.org
Payment: **Invoice**

Special instructions

Document history

- This RFQ has yet to be submitted

| Submit to selected suppliers | Save as Template | Save as Draft | | Cancel | Edit before sending |

This RFQ will be sent to the following suppliers

NAZ4TECH LTD
Categories: **Office Solutions**
LONDON, E17 8JQ
Telephone number: +442073336162
Email: nasir.ahmed@procserve.com
Payment: **Invoice**

NAZ LTD
Categories: **Office Solutions**
LONDON, E17 4SD
Telephone number: +442073331623
Email: nasir.ahmed5@procserve.org
Payment: **Invoice**

Special instructions

Document history

- This RFQ has yet to be submitted

Draft Name: Books_10.2012   Save   Cancel

Now you will be presented with list of all saved list of draft RFQs.

Create a new Request for Quote

| Start | Request for Quotation Templates | Draft Request for Quotations |

Success! You have saved Books_10.2012 as a draft

Name	Suppliers	Items	First Item	Date Saved		
Books_10.2012	NAZ4TECH LTD, NAZ LTD	1	300.0 Lined wire bound A4 note books	10 Aug 2012	Edit	Delete
AUTO DRAFT 1624	NAZ4TECH LTD, NAZ LTD	1	300.0 Lined wire bound A4 note books	10 Aug 2012	Edit	Delete
AUTO DRAFT 1623	ProMatrix, NAZ LTD	1	200.0 Black ink ball point pens	10 Aug 2012	Edit	Delete
Showing 1 - 3 of 3 drafts						

2.2.3.3 Reviewing an RFQ

Overview

This section shows how you review the quotes you have received.
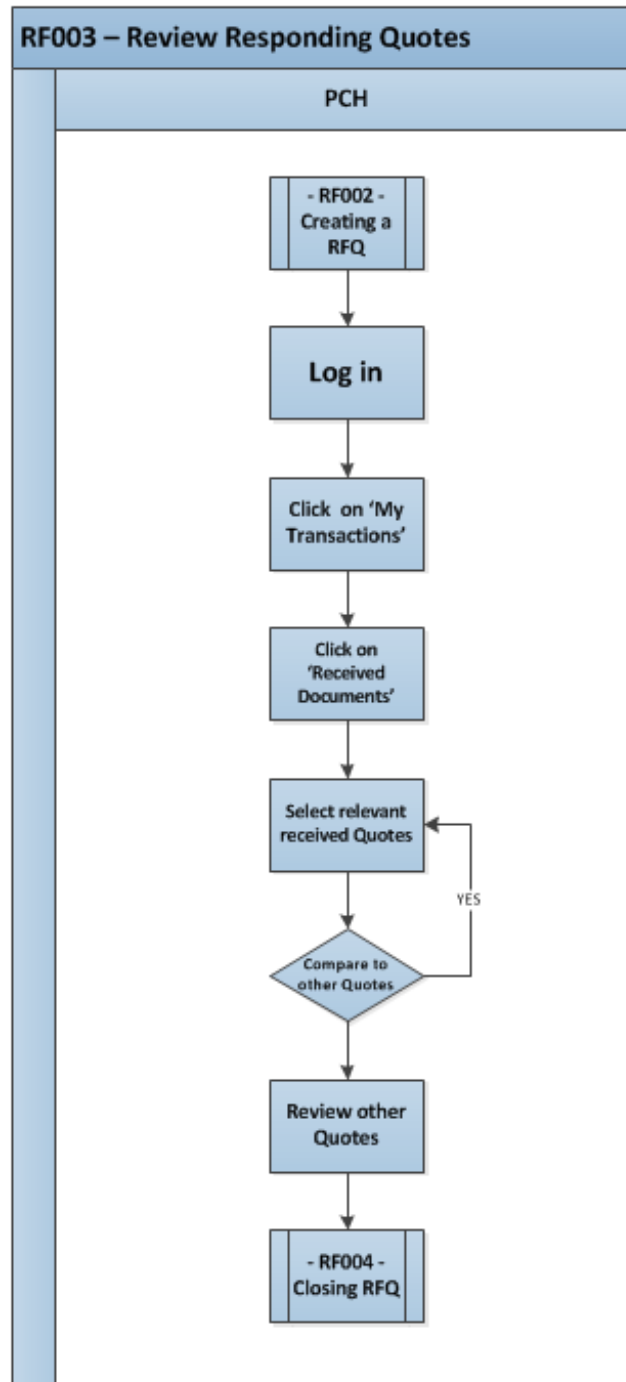
Reviewing received quotes

1. Log in to Procserve Commerce Hub.

2. Navigate to 'My Transactions',
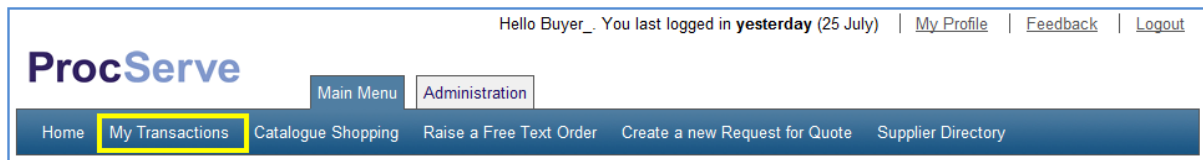
My Transaction page will be displayed, Received Documents will be populated by default, here you will be able to see all of the documents you have received including Invoice, Quotes and Credit Notes.
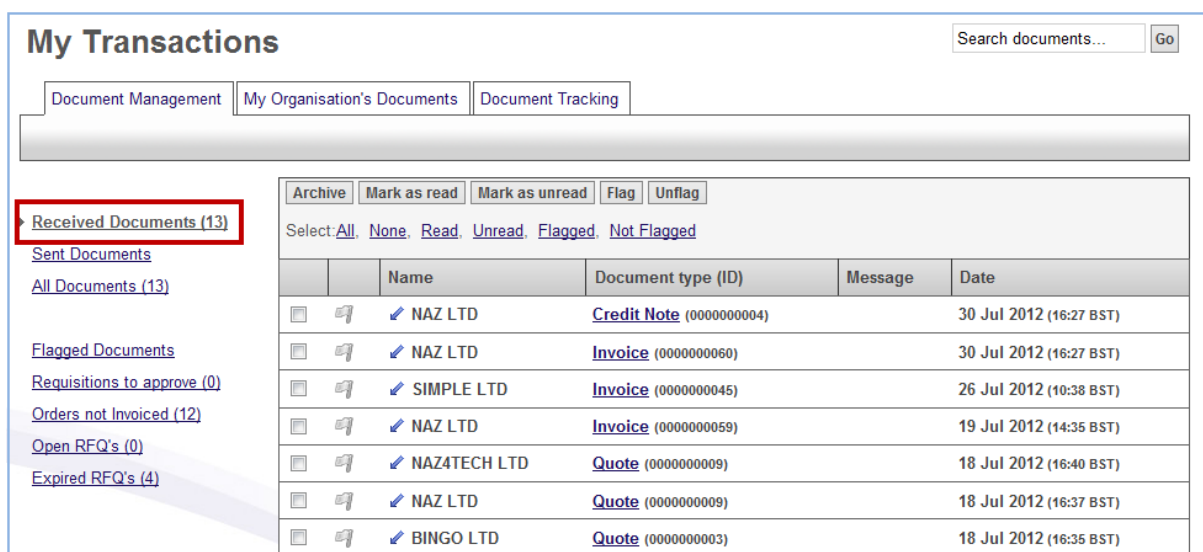
You should see all the transactions that you have received.

3. Click on a quote you have received
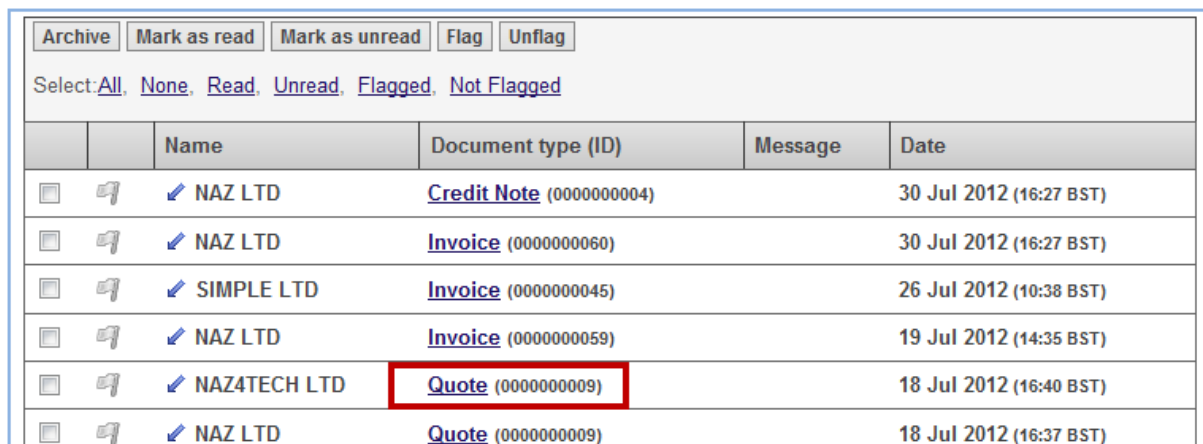
This will show the open quote and show all the other documents in the document tree which you can expand to review.

Quote number 0000000003

Submition Date	15 Jul 2012 (13:12 BST)
Deliver to	**SATURN LTD** Admin _Nas SATURN LTD Hoe Street Walthamstow London E17 4SD United Kingdom
Target delivery date	31 Jul 2012

	From	NAZ4TECH LTD 32 THEOBALD ROAD LONDON E17 8JQ United Kingdom

Item ID	Description	Quantity	Unit Price	Tax rate	Tax amount	Total price
Pens	Black in ball point pens	200 Each	£0.80	VAT 20%	£32.00	£192.00
				Totals	£32.00	£192.00

Supplier comments

Document history

- You received Quote 0000000003 from NAZ4TECH LTD on the 15 Jul 2012
- Raised on the 15 Jul 2012

Tip! You can also review an RFQ by viewing the original RFQ at looking at the quotes at the footer of the document:

Quote evaluation

Quotes received	3
Average price	£204.80
Lowest price quotes	£192.00 - NAZ4TECH LTD £206.40 - NAZ LTD £216.00 - NAZ STORES LTD

[Add a supplier] [Reissue this RFQ] [Withdraw this RFQ] [Forward] [Save as PDF] [Save as a cXML file]

Quotes received ordered by total price with lowest first

Quote 0000000006 - NAZ4TECH LTD - Total price £192.00	⊙
Quote 0000000031 - NAZ LTD - Total price £206.40	⊙
Quote 0000000023 - NAZ STORES LTD - Total price £216.00	⊙

2.2.3.4 Closing an RFQ

Overview

This section shows you how to close an RFQ.
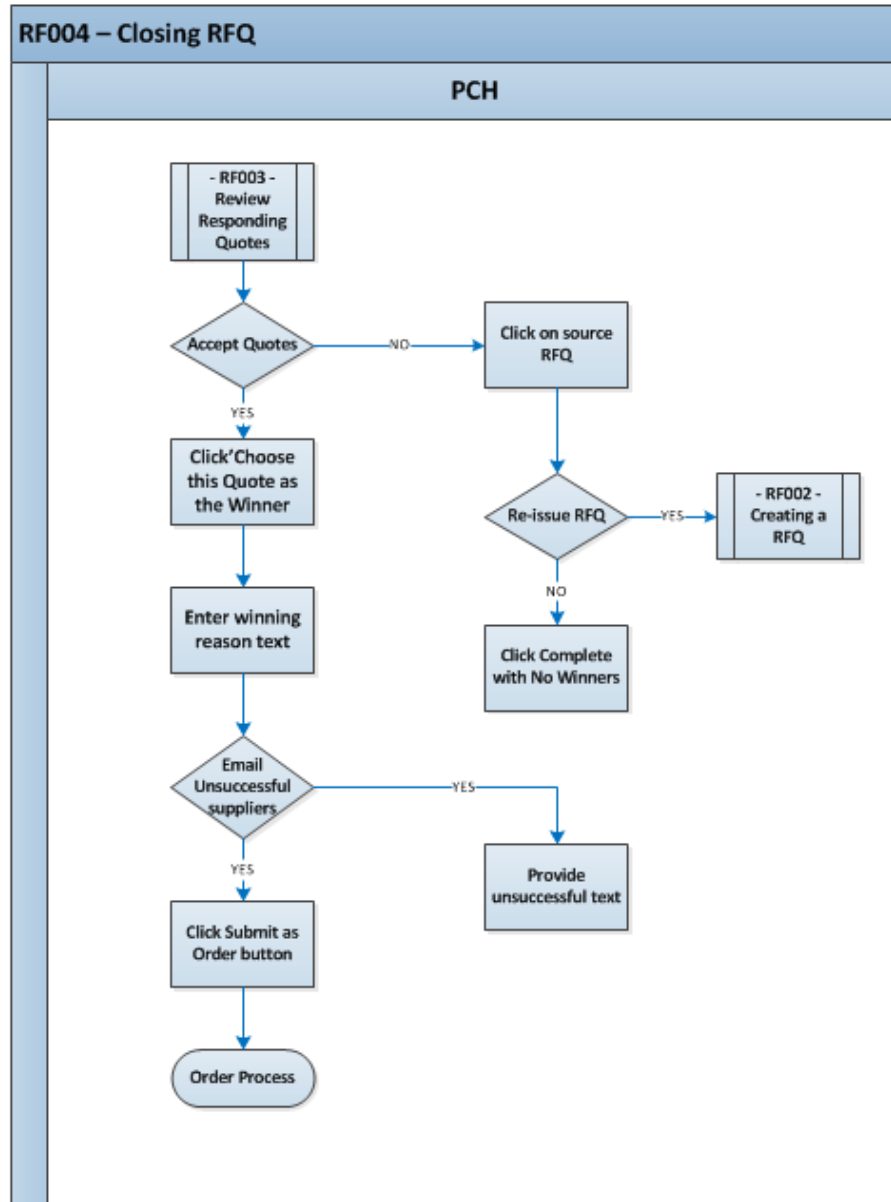
Closing an RFQ

Having reviewed your quotes you can close your RFQ by choosing a winner or closing the RFQ with no winners.

Note: You can withdraw an RFQ before it has closed.

Awarding an RFQ

1. Locate the RFQ within 'My Transactions'

2. Select the winning quote from 'Received documents' in 'My Transactions'

3. Scroll to the bottom of the quote and click 'Choose this quote as the winner'

| Choose this quote as the winner | Forward | Save as PDF | Save as a cXML file |

4. Provide a reason and click 'Choose as winner'

Choose as the winning quote

Please enter a reason for picking this quote as the winner. This reason will not appear on any Supplier facing documents, but will appear in the document history of this quote for future reference.

| Reason | A good price |

| Choose as winner | | Cancel |

You will be presented with 'Submit winning quote' page.

Submit winning quote

Step 1 - Check purchase order items

Item ID	Description	Quantity	Unit Price	Tax rate	Tax amount	Total price
Pens	Pens	200 Each	£0.70	VAT 20%	£28.00	£168.00
				Totals	£28.00	£168.00

| Next step | | Cancel |

Step 2 - Confirm delivery and invoicing details

Step 3 - Add payment details

Step 4 - Confirm details and send requisition

Tip! You can convert your winning quote to an order by clicking 'Submit as order' at the footer of the winning quote.

Closing an RFQ with no winners

1. Locate the RFQ within 'My Transactions'

2. Scroll to the footer of the RFQ and click 'Complete with no winners'

| Reissue this RFQ | Complete with no winners | Forward | Save as PDF | Save as a cXML file |

3. Give a reason why you closed the RFQ with no winners and click 'Complete this RFQ'

procserve

Complete with no winner

Please enter a reason for not choosing any of the quotes received against this RFQ. You reason will be recorded for future reference in this RFQs document history.

Reason	All quotes above target price.

Complete this RFQ   Cancel

You should be presented with a success message.

Withdrawing an RFQ

1. Locate the RFQ within 'My Transactions'

2. Scroll to the footer of the RFQ and click 'Withdraw this RFQ'

Add a supplier   Reissue this RFQ   Withdraw this RFQ   Forward   Save as PDF   Save as a cXML file

3. Give a reason why the RFQ is being withdrawn

Reason for withdraw	RFQ submitted to wrong suppliers

Confirm withdrawal   Cancel

You will receive on screen confirmation that the RFQ has been withdrawn and the suppliers will be automatically informed.

Hello Buyer_. You last logged in **today** (27 July) | My Profile | Feedback | Logout

ProcServe

Main Menu   Administration

Home   **My Transactions**   Catalogue Shopping   Raise a Free Text Order   Create a new Request for Quote   Supplier Directory

My Transactions

Document Management   My Organisation's Documents   Document Tracking

This RFQ has been withdrawn. The suppliers concerned have been informed.

RFQ number 2428

Creation date	27 Jul 2012 (12:26 BST)		Invoice to	SATURN LTD
Deliver to	SATURN LTD			Buyer_ Administrator
	Buyer_ Administrator			Hoe Street
	Hoe Street			Walthamstow
	Walthamstow			London
	London			E17 4SD
				United Kingdom

2.2.4   Supplier Directory

2.2.4.1   Introduction to the Supplier Directory

Overview

Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.

Note: If you can not see 'Supplier Directory' you may not have the required role. Please check with your system administrator.

Supplier Capabilities

There are up to seven Supplier Capability icons associated with each supplier depending upon the suppliers current status.

These capabilities reflect the supplier registration status, their system integration capabilities, multi-buyer status and environmental certification.

The seven Supplier Capability icons are as follows:

 Supplier has been pre-registered but have yet to complete the registration process. They are able to receive PO via email but do not have access to the Procserve Commerce Network.

 Supplier has completed registration and has full access to the Procserve Commerce Network.

 A supplier that currently delivers one or more catalogues to one or more buyers.

 A supplier that has submitted at least one quote to an RFQ.

 A supplier that has submitted one or more electronic invoices to one or more buyers.

 A supplier who is back-end integrated using the Procserve Commerce Network.

 Environmentally Certified.

2.2.4.2 Viewing Suppliers my Organisation has traded with

Overview

'Suppliers my Organisation has traded with' shows all the organisations that you have sent an order or a Request for Quote to or have received an Invoice, Quote or Credit Note from.

Using 'Supplier my Organisation has traded with'

1. Click on the 'Main Menu' tab within Procserve Commerce Hub
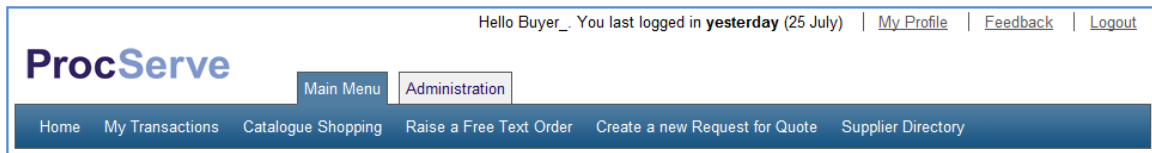
2. Click on the 'Supplier Directory'

From here you can view the suppliers by their name using the alpha numeric list [1] and search for a supplier [2].
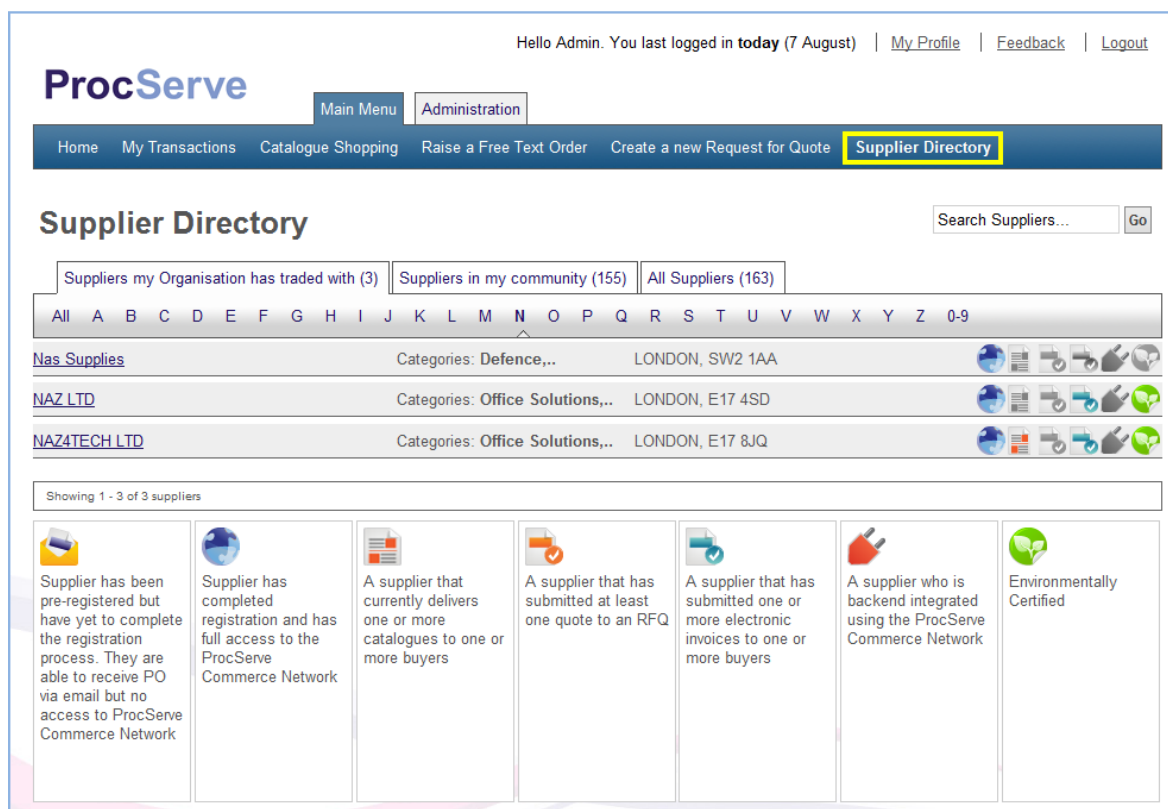
2.2.4.3   Viewing All Available Suppliers in the Community

Overview

'All available suppliers' shows all the organisations that are on the Procserve Trading Network and available in your marketplace.

Using 'All available suppliers'

1. Click on the 'Main Menu' tab within Procserve Commerce Hub

2. Click on the 'Supplier Directory' tab

3. Click on the 'All suppliers' tab

From here you can view the suppliers by their name using the alpha numeric list [1] and search for a supplier [2]

Note: You can search the Supplier Directory by suppliers name, category, DUNS number, contact details or description.

2.2.5   Transactions Created in Procserve Commerce Hub

2.2.5.1   Introduction to My Transactions

Overview

My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created. These could include:

Purchase Requisitions
Purchase Orders
Request for Quotes
Quotes
Invoices
Credit Notes

Note: What you see in My Transactions depends on the Roles that you have been assigned.

2.2.5.2 Received Documents

Overview

Received documents are documents that have been created by someone else but made available to you to view or action. You can see the transactions you have received in 'My Transactions'. You may also be able to see all the organisations transactions if you have the required roles.

If a document, such as an invoice, quote or credit note, has been submitted then the relevant user will receive an email informing them of the document.

To view Received Documents

1. Click on the 'Main Menu' tab within Procserve Commerce Hub
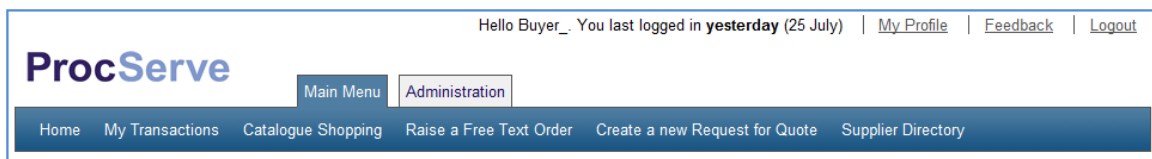
2. Click on 'My Transactions'
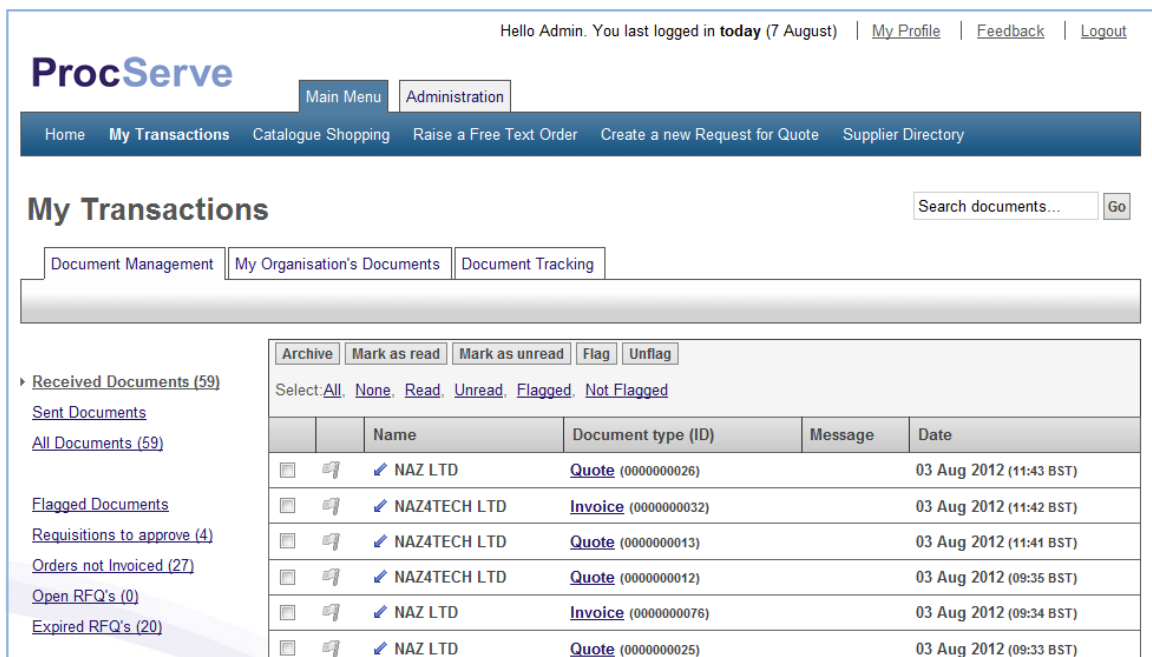
You will be taken the the 'My Transactions' page where you can navigate if required to 'Received documents'

Note: Dependant on your role, you may be able to view transactions across your organisation. You may, as a result, be provided with a further menu filter - 'Show my transactions only' and 'Show all transactions for my organisation'.

My Transactions

ProcServe

Main Menu | Administration

Home | **My Transactions** | Catalogue Shopping | Raise a Free Text Order | Create a new Request for Quote | Supplier Directory

My Transactions

Search documents… [Go]

Document Management | My Organisation's Documents | Document Tracking

Archive | Mark as read | Mark as unread | Flag | Unflag

Select: All, None, Read, Unread, Flagged, Not Flagged

▸ **Received Documents (59)**

Sent Documents

All Documents (59)

Flagged Documents

Requisitions to approve (4)

Orders not Invoiced (27)

Open RFQ's (0)

Expired RFQ's (20)

		Name	Document type (ID)	Message	Date
☐	✎	✎ NAZ LTD	Quote (0000000026)		03 Aug 2012 (11:43 BST)
☐	✎	✎ NAZ4TECH LTD	Invoice (0000000032)		03 Aug 2012 (11:42 BST)
☐	✎	✎ NAZ4TECH LTD	Quote (0000000013)		03 Aug 2012 (11:41 BST)
☐	✎	✎ NAZ4TECH LTD	Quote (0000000012)		03 Aug 2012 (09:35 BST)
☐	✎	✎ NAZ LTD	Invoice (0000000076)		03 Aug 2012 (09:34 BST)
☐	✎	✎ NAZ LTD	Quote (0000000025)		03 Aug 2012 (09:33 BST)

2.2.5.3 Transactions that have been Sent

Overview

You can see the transactions you have sent in 'My Transactions'. You may also be able to see all the organisations transactions if you have the required roles.

1. Click on the 'Main Menu' tab within Procserve Commerce Hub
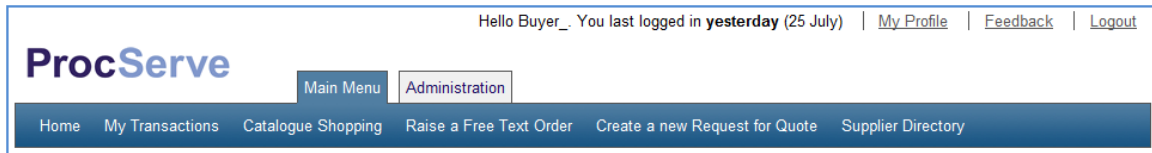
2. Click on 'My Transactions'
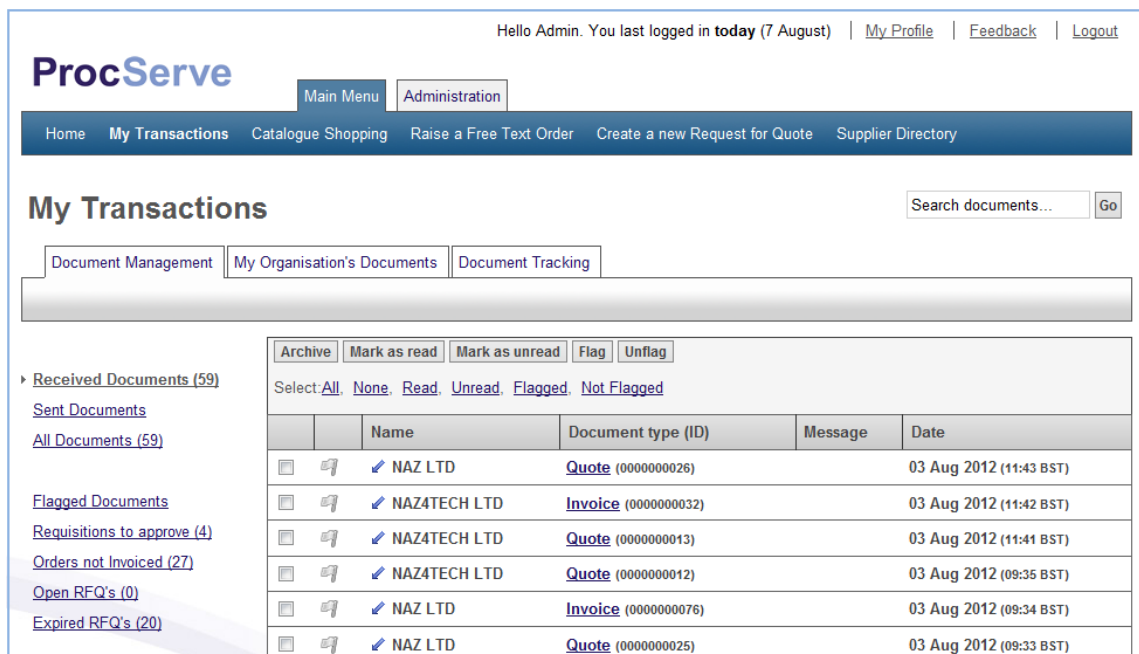
You will be taken the the 'My Transactions' page where you can navigate if required to 'Sent documents'.

Note: Dependant on your role, you may be able to view transactions across your organisation. You may, as a result, be provided with a further menu filter - 'Show my transactions only' and 'Show all transactions for my organisation'.

2.2.5.4 Retrieving Archived Documents

Overview

You can see the transactions that have been archived in 'My Transactions'. You may also be able to see all the organisations transactions if you have the required roles.

1. Click on the 'Main Menu' tab within Procserve Commerce Hub
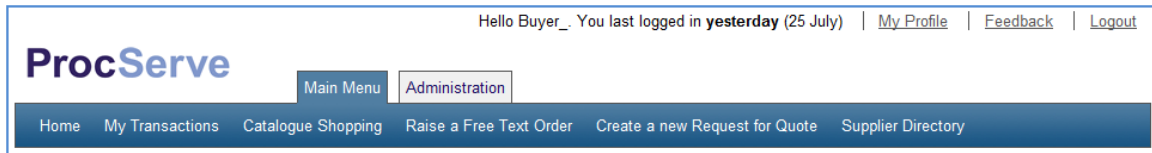
2. Click on 'My Transactions'

You will be taken the the 'My Transactions' page

3. Click 'All Documents' to view all documents including those that have been archived.

Archiving documents

1. Click the tick box next to a transaction. Note: You select multiple transactions.

2. Click the 'Archive' button

Your documents will be moved to the archive.

2.3 Procserve Commerce Hub Administration

2.3.1 Overview

Administration Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Community Management - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

2] Organisation Management - You can view and edit the the general address details of your organisation in 'Organisation Management'.

3] User Management - You can add, edit and deactivate users within your organisation in 'User Management'

4] Supplier Registration - You can manage your supplier adoption in 'Supplier Registration'

5] Catalogue Access Management - You can determine which organisations and users can see what content in 'Catalogue Access Management'

6] Catalogue Management - You can upload and manage your catalogue content in 'Catalogue Management'

2.3.2   Managing your Supplier Adoption

2.3.2.1   Overview of Supplier Registration

Overview

This section describes how you can add new suppliers to the Procserve Trading Network. By loading a suppliers details they will automatically be added as a basic supplier. This section looks at both the loading process and the tools to progress supplier registration.

Supplier Registration

1. Click on the 'Administration' tab
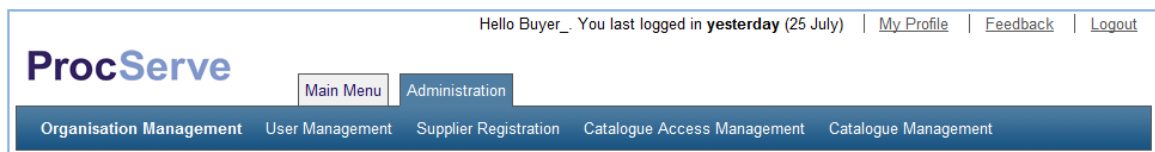
2. Click 'Supplier Registration'
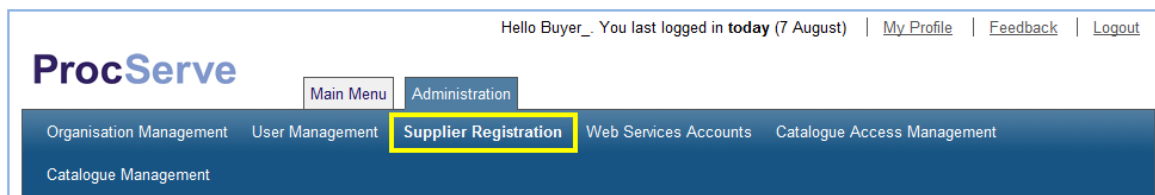
From here you can see the three tabs used in Supplier Registration

Tip! Adding new suppliers

You can invite new suppliers to join the Procserve Trading Network. For more information on this view the 'Registering New Suppliers'.

Browse invited suppliers

You can search all the suppliers you have added and have not yet registered. You can also remind selected suppliers to complete registration.

Top targeted suppliers

You can add suppliers to 'Top targeted suppliers' to ensure that you focus effort on adopting these. See the 'Targeting your Suppliers' for more information.

Now enhanced suppliers

You can view the suppliers you have invited that have registered on the Procserve Trading Network and the status they have achieved. There are three types of enhanced suppliers: Bronze, supplier has agreed the terms and conditions and now has access to the Supplier Portal; Silver, as Bronze and the supplier has provided content; Gold, as silver and the supplier has some form of back office integration.

2.3.2.2   Registering New Suppliers

Overview

Dependant on your role, you can invite and add new suppliers for yours and on behalf of other organisations using Supplier Registration.

Note: Dependant on your community and organisation setup some of the screens and steps may appear differently.

To add a new Supplier to the marketplace

1. Click on the 'Administration' tab
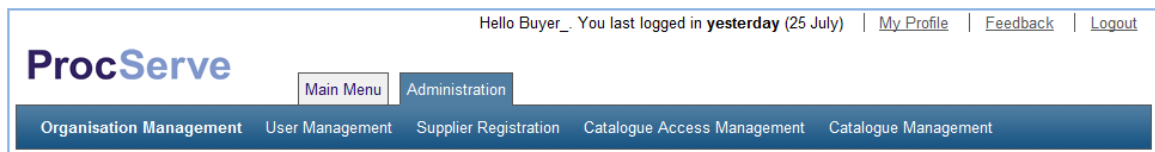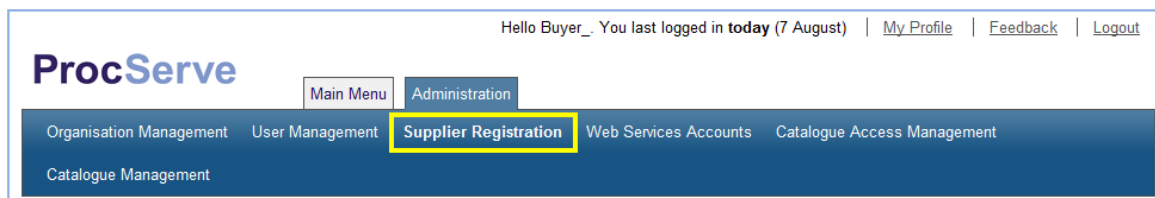
2. Click 'Supplier Registration'

From here you will see all suppliers that you have invited and are currently in the registration process.

3. Click 'Invite a new supplier'
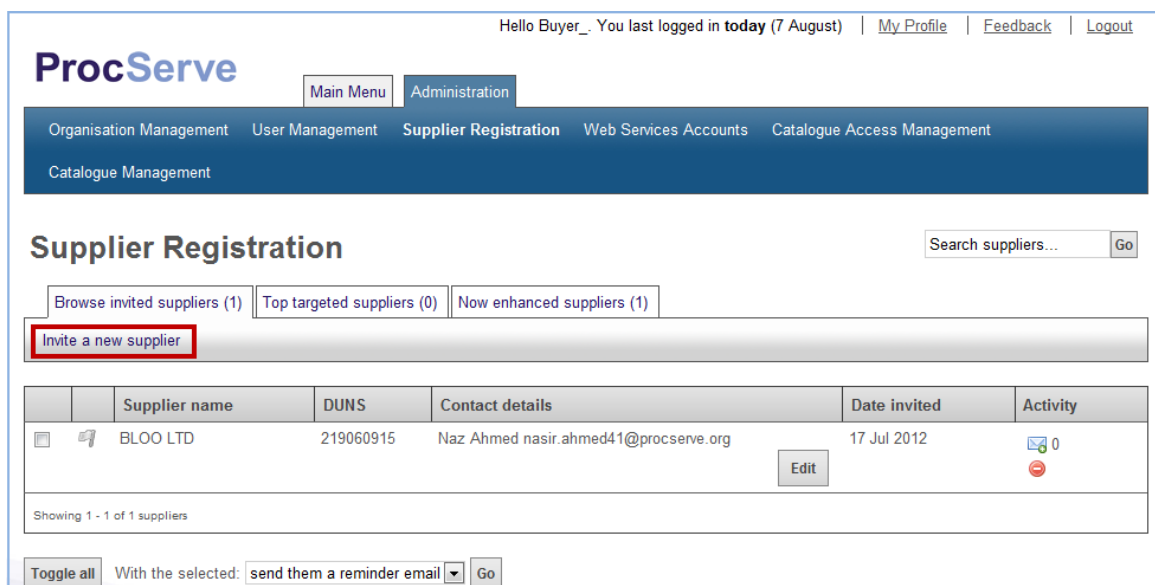
NOTE: Steps 4 and 5 only apply for the Community Administrator.

4. Search for the buying organisation you wish to register the supplier for.

5. Choose the buying organisation you are inviting the supplier on behalf of and click 'Invite supplier for this organisation'

6. Fill in the web form to search for the details of the supplier

Step 2 - Find the supplier

Supplier name *	
Address	
City / Town *	
County	
Country	United Kingdom
Post Code	

Find this supplier

Step 3 - Add contact details for the supplier

7. When complete click 'Find this supplier'

Your results will be shown at the bottom of the page.

8. Click 'Invite this supplier' to select your chosen supplier

Search Results (10)

Result relevance	Registered name	Trading name	DUNS Number	Address details	
80%	Atlas Property Letting Services		210340911	*4 South Ealing Road LONDON W5 4QA*	Invite this supplier
80%	ATLAS DEPOSITS LTD		216733129	*4 South Ealing Road LONDON W5 4QA*	Invite this supplier
80%	ATLAS PROPERTY LETTING & SERVICES LTD		769996786	*4 South Ealing Road LONDON W5 4QA*	Invite this supplier
50%	The Atlas		213453967	*16 Seagrave Road LONDON SW6 1RX*	Invite this supplier

9. Add the contact details for the supplier and click 'Invite this supplier'

Step 3 - Add contact details for the supplier

Supplier name	The Atlas
DUNS Number	213453967
Address	16 Seagrave Road
City / Town	LONDON
County	
Country	GB
	SW6 1RX

Add contact details for this supplier

Contact name *	
Email address *	
Order email address	

Invite this supplier

You should then get a success message.

Supplier Registration

Search suppliers... [Go]

| Browse invited suppliers (42) | Top targeted suppliers (3) | Now enhanced suppliers (58) |

Invite a new supplier

Success! You have successfully invited The Atlas. To add them to your Top targeted suppliers list click on the grey flag next to their name below.

		Supplier name	DUNS	Contact details	Originally invited by	Date invited	Activity
☐	⚑	The Atlas	213453967	Atlas Man nasir.ahmed60@procserve.org [Edit]	Jupiter Buyer Ltd	07 Aug 2012	✉ 1 ✉ 0 ⛔
☐	⚑	COMPAY LTD	458973823	A Company nasir.ahmed58@procserve.org [Edit]	Jupiter Buyer Ltd	01 Aug 2012	✉ 1 ✉ 0 ✏

2.3.2.3 Reminding Suppliers to Join

Overview

Once a supplier has been invited to join the Procserve Trading Network you can remind them to complete their registration.

Sending reminders to suppliers

1. Click on the 'Administration' tab
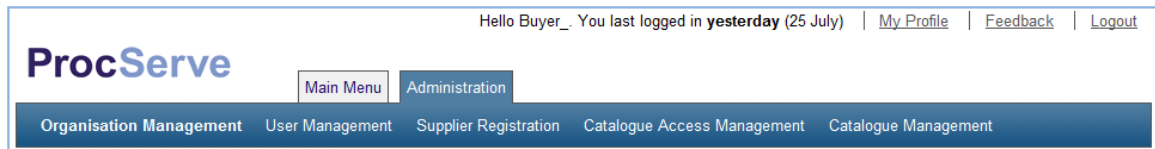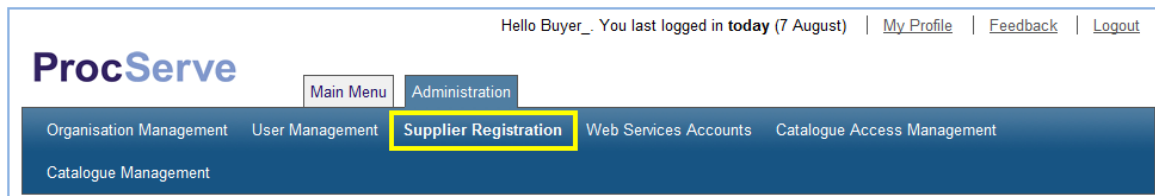
2. Click 'Supplier Registration'

From here you will see all suppliers that you have invited and are currently in the registration process.

3. Tick the box next the supplier you wish to remind and then at the footer of the page click 'Go'

You will then be presented with the email wizard for sending a reminder email.

Note: You can change some of the text in the reminder email but the second half remains static as this contains the important registration details.

4. When satisfied with the email click 'Send' at the footer of the page.

Once the email has been sent you will get a success message.

Supplier Registration

| Browse invited suppliers (1) | Top targeted suppliers (0) | Now enhanced suppliers (1) |

Success! Your email has been sent to the suppliers you selected.

To:	nasir.ahmed41@procserve.org
Subject: *	A reminder from SATURN LTD

We recently invited you join the ProcServe Trading Network. I notice that you haven't yet registered.

The ProcServe Trading Network is SATURN LTD's preferred method of sending orders to our suppliers and all our orders will be sent to you via the ProcServe Trading Network.

We would like you to join the ProcServe Trading Network so you can provide content for our buyers and return eInvoices. At the moment we can only send free text orders to {SupplierName}.

Transacting online has advantages for both SATURN LTD and {SupplierName}. Removing paper from our transaction processes will save both our organisations money and contribute to a greener environment. I'm sure you agree that manual paper processes can be time consuming, inefficient, and a drain on resources.

To find out more about the ProcServe Trading Network, please visit http://www.procserve.com/solutions-and-services/supplier-enablement-services.html

2.3.2.4 Targeting your Suppliers

Overview

You can target certain suppliers you have invited to join the Procserve Trading Network. You can use this feature to make it easier to send reminder emails and track the status of priority suppliers.
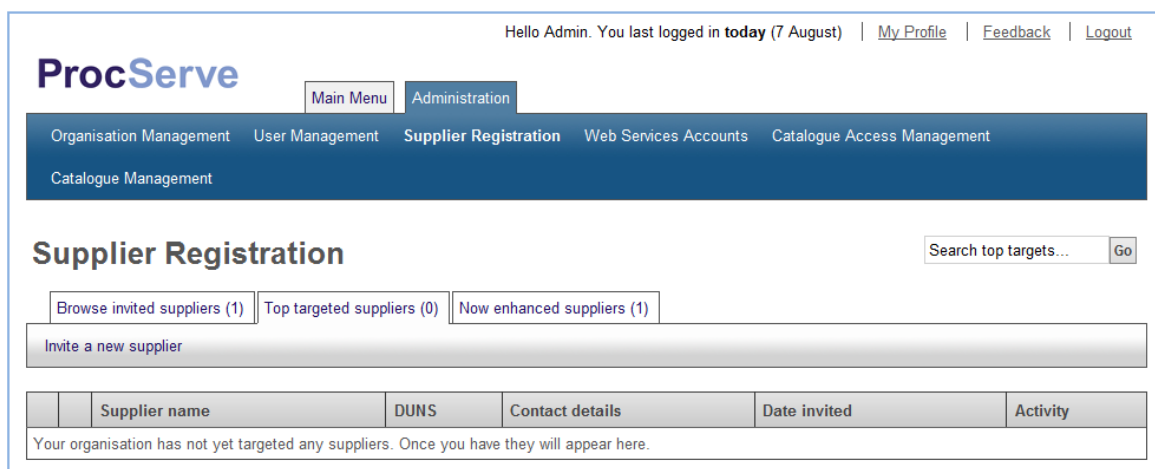
Viewing your top targeted suppliers

1. Click on the 'Administration' tab
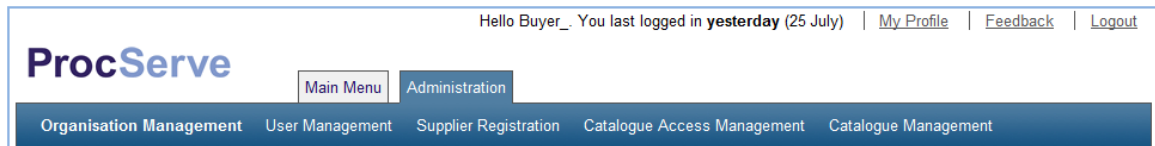
2. Click 'Supplier Registration'
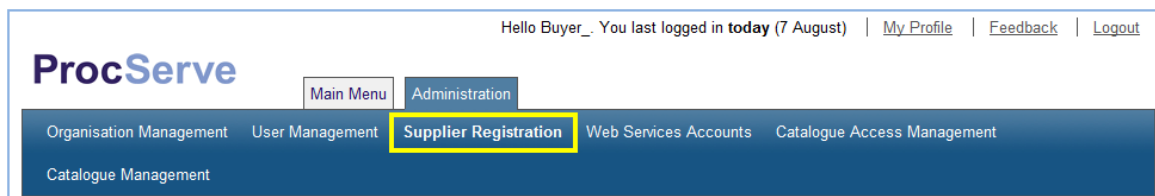
3. Click on 'Top targeted suppliers'

You can view all the suppliers in your top target list.

2.3.2.4.1 Adding a new supplier to your top targeted list

Overview

You can dynamically add and remove suppliers from your 'Top targeted suppliers' tab.

1. Search for the supplier in 'Browse invited suppliers'

2. Select the organisation you wish to add to the 'Top targeted suppliers' tab by clicking the flag.

Your 'Top targeted suppliers' tab will now be updated with the number of suppliers targeted.

Tip! You can remove suppliers from the top targeted list by clicking the flag.

2.3.3   Managing your Users

2.3.3.1   Introduction to User Management

Overview

You can add, edit and deactivate users within your organisation in 'User Management'.

2.3.3.2   Add a New User

To add a New User to your Organisation.

1. Log on to PCH as administrator.

2. At home page select Administration menu, then select 'User Management'.

3. Click on 'Add a new user'.

4. Complete the form, from dropdown menu select the appropriate role for the user and click on 'Add this user' button

Upon completing the form and clicking on the 'Add this user' button, you will receive two emails, one containing username and second containing a temporary password.

Note: The temporary password is one time use only, you will be asked to change the temporary password as you login for the first time.

TIP: Copy and paste your username password from your emails instead of typing in manually.

Below are examples of one of two email the user receives.

Email with username

Email with password

Hello Super

Welcome to the Zanzibar eMarketplace.

Your account has been set up and you can now access the marketplace at any time from your Internet browser. To access your account you will need both your User Name (which will be sent in a separate email for security reasons) and your Password (included below).

Your temporary Password is: bBy7Bn)P

Using this and your User Name you can now log in to the eMarketplace at:

https://buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB

It is recommended that instead of typing the Password try copying and pasting it into the login screen using the following steps:
1. Highlight the Password making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'

5. Copy and paste the URL from the email into your browser.

6. At log in screen, copy and paste username and password and click on 'Login' button.

7. You will be asked to change your temporary password to something that you will be able to remember.

8. Also you need to provide a memorable word so if you locked your account you will be asked to provide the memorable word to unlock your account.

2.3.3.3 Editing an Existing User

Overview

You can edit the basic details of a user in User Management.

To edit a user

1. Click on the 'Administration' tab
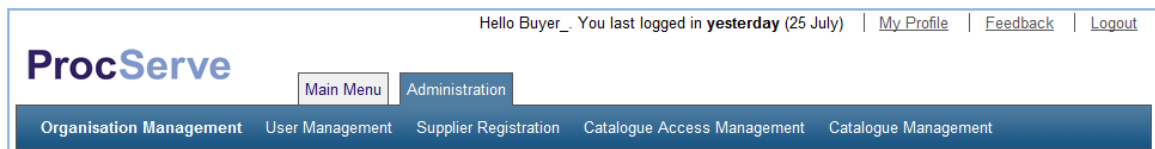
2. Click on 'User Management' and then the link of the user you wish to add to an organisation
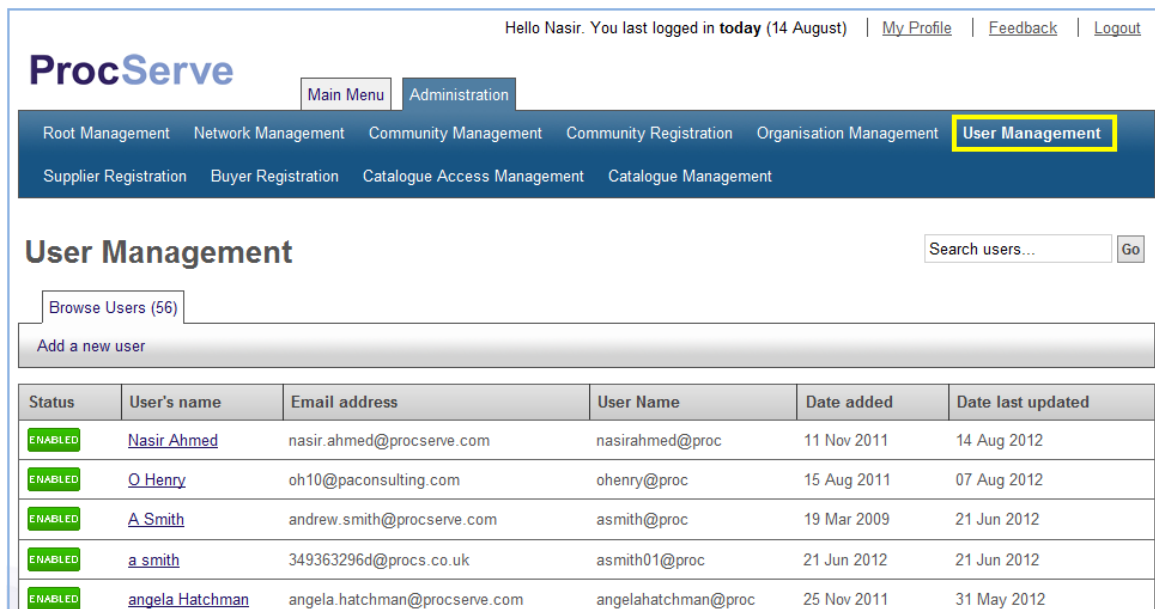
3. Click on 'Edit general information'

4. When complete click 'Save' at the footer of the page

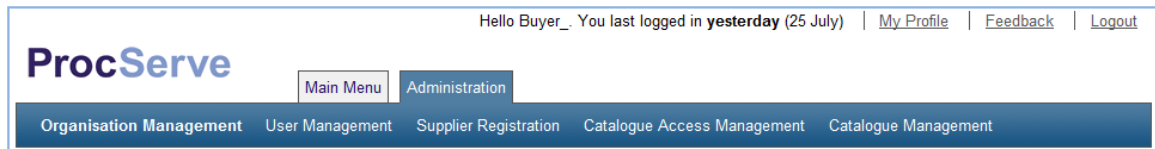**Note:** You can also edit the roles the user has access to on the 'Roles' button.

2.3.3.4 Editing the Roles a User has in an Organisation

Overview

At any time you can amend a users role they have within an organisation.

To edit the roles of a user

1. Click on the 'Administration' tab

2. Click on 'User Management'

3. Click on the user you wish to edit the roles for
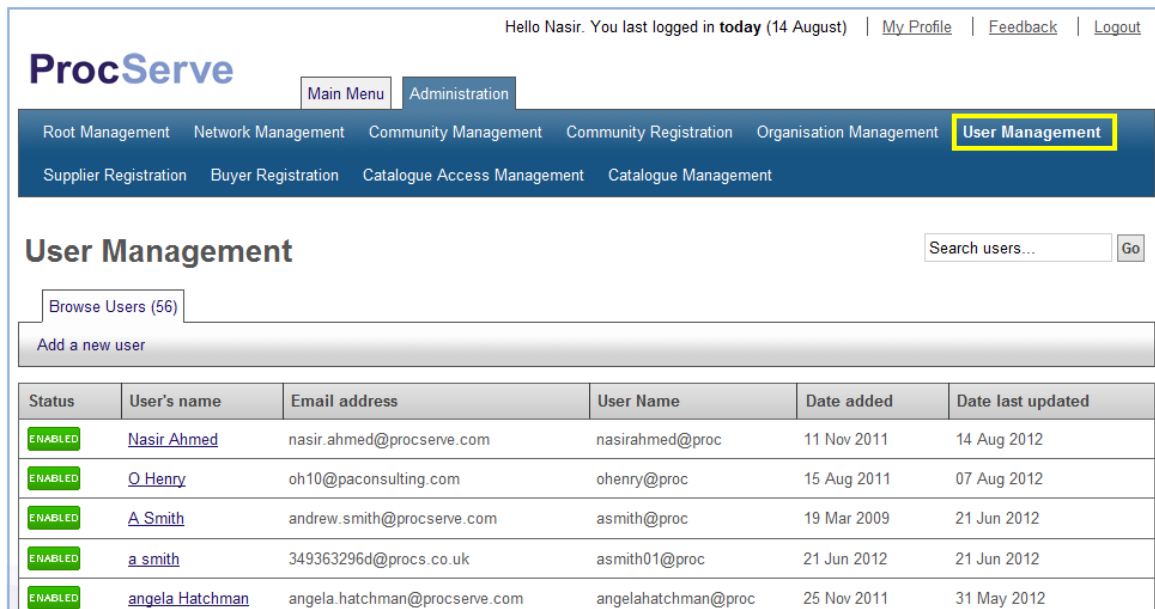
4. Click on 'Roles' to edit their roles in the organisation

5. Enable and disable roles as required by clicking the 'Enable role' or 'Disable role' button as necessary.

Note: There is no need to save any changes but the user will have to re-log in for the changes to take effect.

2.3.4   Administering Procserve Commerce Hub
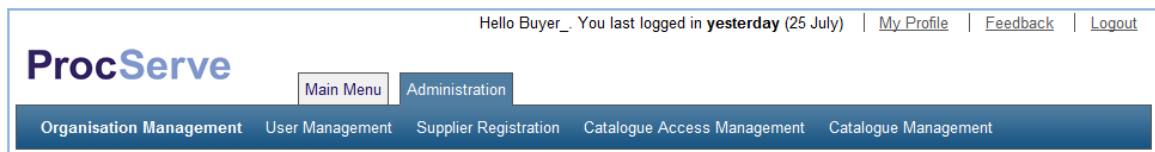
2.3.4.1   Managing my Organisation

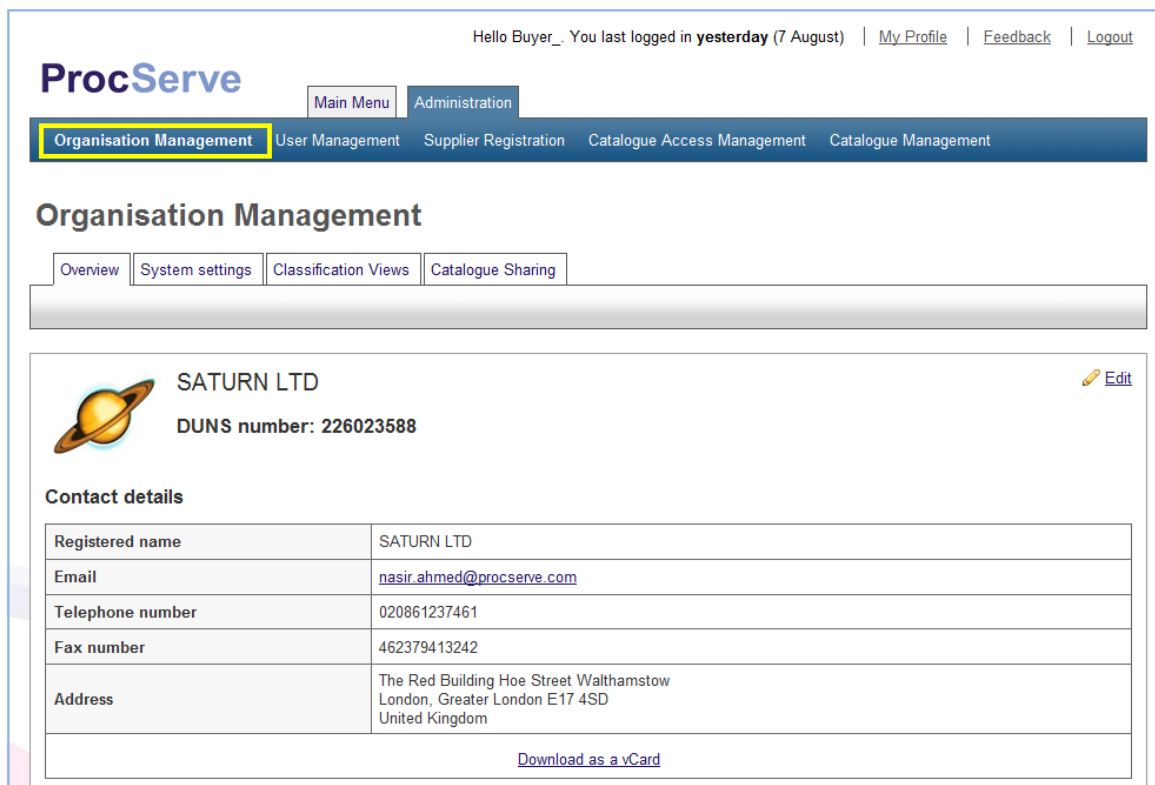2.3.4.1.1 Editing the Organisation's General Details

Overview

You can view and edit the the general address details of your organisation in 'Organisation Management'.

Editing your Organisation's overview

1. Click on the 'Administration' tab

2. Click on 'Organisation Management'

3. To edit the details click 'Edit'

4. Once complete click 'Save Changes'

Organisation Management

Overview | System settings | Classification Views | Catalogue Sharing

Organisation name *	SATURN LTD
Logo	[Browse...] Make sure that the image you use is 100 pixels wide by 80 pixels high - leave this blank to continue using the current image
DUNS number	226023588 - Sorry you can't edit this

Contact details

Registered name *	SATURN LTD
Website	
Email	nasir.ahmed@procserve.com
Telephone number	020861237461
Fax number	462379413242
Address *	The Red Building Hoe Street Walthamstow
City / town *	London
County	Greater London
Country *	United Kingdom
Post Code *	E17 4SD

Financial information

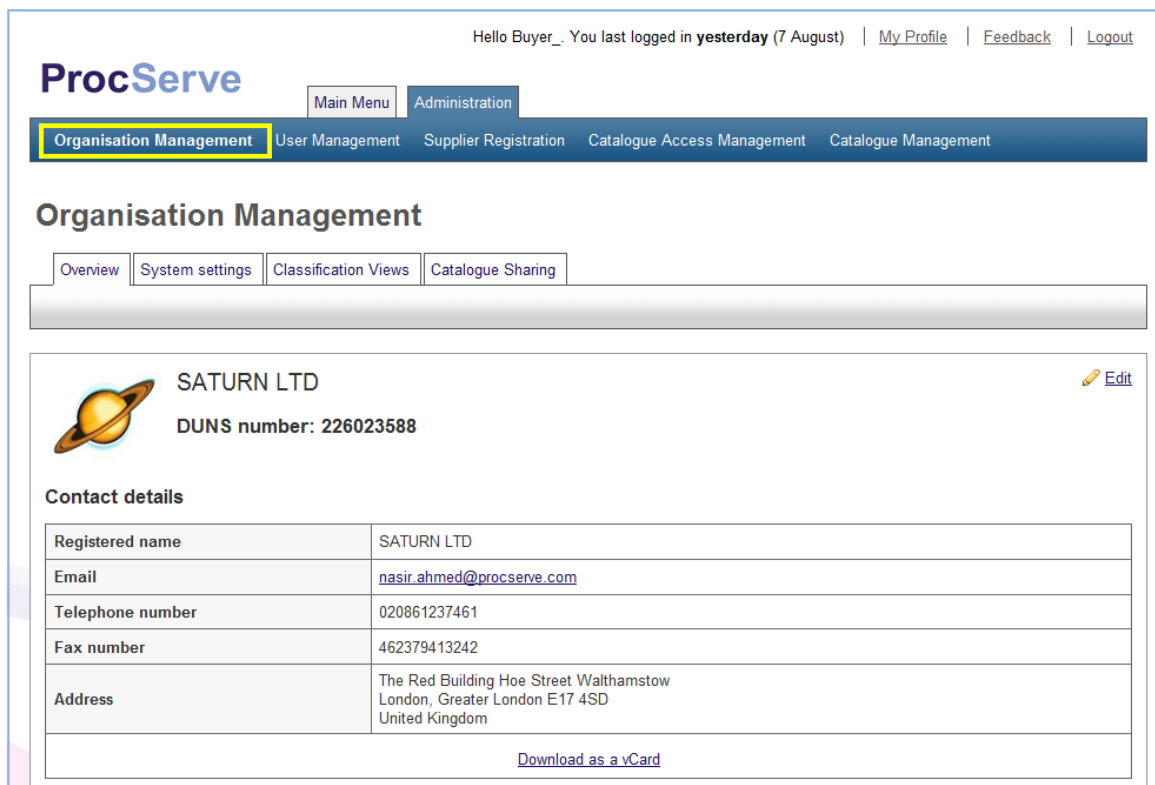|	
Tax rate	GB VAT Standard 20.0%
Tax number	GB891208789

Other information

Purchase Order T&C	

[Save Changes] [Cancel]

2.3.4.1.2 Editing the Organisation's System Details

Overview

You can edit your organisations system settings in 'Organisation Management' 'System Settings'

Editing your organisation's system settings

1. Click on the 'Administration' tab
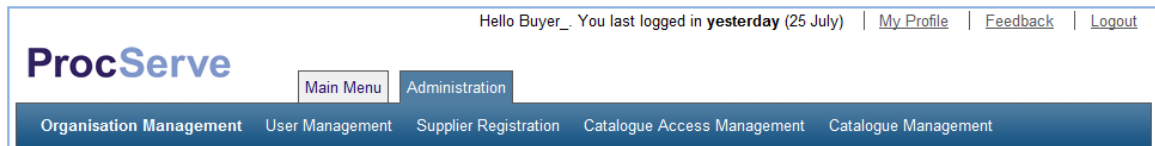
2. Click on 'Organisation Management'

3. Click on 'System Settings'

4. To edit the system settings click 'Edit'

5. Once complete, click 'Save Changes'